

## Prospective Board of Trustee Screening Interview Process

*Screening interview process for candidates the organization is considering for committee and Board of Trustees membership*

1. **Management sends background information to all candidates**, for their review prior to the screening interview.

*Information would likely include:*

- Organizational brochure
- List of organizational volunteer opportunities including committee membership, Board of Trustees membership, and other volunteer activities.
- List of organization committees, specifying purpose of committee, as stipulated on committee description
- *(Perhaps sent out in advance. Or more likely, sent out after the preliminary discussion, once the individual expresses interest in the organization.)* Relevant policies including Board of Trustee member roles and expectations, Board and committee operations, etc.

2. Key points to cover in the screening interview include:

- **First review process and purpose of this meeting.**
  1. The organization regularly reaches out to individuals and conducts these “getting-to-know-each-other” interviews. The purpose of the interview is to determine if there is a good match between the individual’s interests and expertise, and the organization’s needs. During the interview, do not guarantee a position – on the Board of Trustees or committees/task forces.
  2. Reports from these “getting-to-know-each-other” interviews are discussed at subsequent Governance Committee meetings. Then a representative of the Governance Committee contacts the individual as a follow-up.
- **Engage the individual in discussion** because this is the way to find out if the individual is a good match with the organization. For example, ask such questions as:
  1. Why did you agree to meet with us today? What do you know about our organization? Why are you interested in this organization?
- **Review the organization’s values, mission and services.** It is important that candidates for committees and board membership share your organization’s values.
  1. Talk about how your organization lives its values. Listen to and watch the reaction of the candidate.

2. Talk about the major issues facing the organization at this time. Share challenges and opportunities. Engage the person in a conversation about how they feel about these challenges and opportunities.
- Talk about **how the organization uses volunteers**.
    1. Review list of committees and their purposes.
    2. Review relevant policies.
    3. Specify typical meeting schedule and frequency of committees and Board.
  - **Review skills, experiences, and diversity and network needs** that the organization has decided it needs.
    1. Discuss with the candidate which skills, experiences, and diversity and networks s/he would be comfortable using on behalf of the organization as a volunteer. (Do not specify a particular position at this time.)
    2. Ask the candidate whether she / he would use the skill that you need on the organization's behalf.
  - **Close the meeting with the following:**
    1. Ask the individual to think about the discussion.
    2. Indicate that the Governance Committee will meet to review the results of all its discussions with individuals.
    3. Indicate that you will contact the individual within a month to follow-up about his/her interest and a possible position within the organization.
  - **Debrief with the Governance Committee** and contact the individual within a month to invite to serve on a specific committee or the Board.
    1. If the invitation is for Board membership, remind the individual that s/he must commit to the relevant policies before being nominated for election; and, must use the previously-discussed skills, and experiences that the organization has identified of value for its work