

Finding and Recruiting Volunteer Candidates

People volunteer for different reasons. Surveys conducted by CUNA's Economics and Research Department and other organizations reveal recurring themes.

If you have difficulty recruiting board members, you are not alone. About two-thirds of credit unions responding to a *Credit Union Directors Newsletter's* Volunteer Survey Report experienced at least some difficulty recruiting board members. Recruiting has become a significant challenge for those credit unions that fail to take a systematic approach to the problem. To establish a system for recruiting, orienting, and retaining board members, it helps first to understand what motivates people to volunteer.

People volunteer for different reasons. Surveys conducted by CUNA's Economics and Research Department and other organizations do reveal recurring themes, however. The most common responses are listed in figure 1.1. First on the list is the desire to be of service to a community. Helping others is rewarding to volunteers, and some feel they are giving something back to their community in exchange

for what they have received. A closely related motivator for volunteers is the fulfillment they get. They enjoy contributing to some cause beyond their personal needs.

Two other closely related reasons for volunteering are career development and professional growth. Volunteers find contacts for networking and can share and develop their business skills. Volunteers might find or become mentors. And they can take advantage of credit union training and development programs that benefit them in their professional lives.

Some people enjoy the status and a sense of control that can come from volunteering. Especially on a board of directors, volunteers can gain the recognition and respect of a credit union's members and managers. They might enjoy the challenge and responsibility of setting policies and making key decisions.

Surveys also indicate reasons for not volunteering. The most common are

Figure 1.1

Common Reasons for Volunteering or for not Volunteering

• To Volunteer

- Service to a community
- Personal fulfillment
- Career development
- Professional growth
- Status
- Control
- Social contacts
- Staying active

• To Decline to Volunteer

- Time constraints
- Inconvenience
- Shortage of volunteers
- Too many requirements
- Lack of appreciation
- Liability concerns

**Avoid the
“just-like-me”
syndrome.**

listed in figure 1.1. It’s predictable that the most commonly cited reason is time constraints. Jobs and family obligations often take all or most of a person’s time, and hours available for volunteering are few. The situation is even worse if volunteering becomes difficult or impossible because of inconvenient meeting times and locations. Time can also be a factor if there’s a shortage of volunteers and people feel that they’ll end up with too much work to do.

According to the U.S. Department of Labor’s Bureau of Labor Statistics, the proportion of the population that volunteered in 2006 was 26.7 percent, a decline from prior years.

People often resist volunteering if they believe the position will have many requirements—if, for example, there are too many meetings or extensive training required for the work. Similarly, they may choose not to volunteer, or to quit volunteering, if they perceive a lack of appreciation on the part of people they are serving. Finally, volunteering can sometimes include risks and liability concerns. Boards of directors shoulder a lot of responsibility, and the possibility of lawsuits in response to unintended developments can be threatening to potential volunteers.

What all of this means is that if you depend on volunteers, you have tremendous resources, opportunities, and challenges ahead as you fill volunteer positions. With the five-step system we explore in this module, you’ll be able to meet the challenges and capitalize on the opportunities.

Create a Recruiting Philosophy and Plan

Recruiting, orienting, and retaining volunteers is an ongoing process. Rather than muster everyone’s attention and energy only when a new director is needed, it’s more efficient to have a system in place and to maintain it steadily. This is part of a philosophy that serves as a foundation for an effective recruiting system.

A Recruiting Philosophy

Your **recruiting philosophy** is a summary of the ideals and principles that help choose and apply the best techniques for recruiting. The philosophy can include ideals common to all credit unions—for example, it’s important for any credit union to have a board that reflects the makeup of the membership. At the same time, your philosophy can include principles tailored to your organization—if your board has traditionally been made up of middle-aged or older members, for example, you might want to recruit younger volunteers to ensure that the credit union is in tune with the current and future marketplace.

Other elements of a recruiting philosophy are:

- *Value diversity.* Keep the board at least as diversified as the members are, and perhaps even more so if you’re trying to expand membership into new segments of the market. Think about what you want your membership to look like. If the board is to reflect that, you might need to intensify recruiting efforts across race, gender, and age groups.

Define your required skills. Determine the skill sets you desire, then seek prospective volunteers who possess them.

- *Limit the number of “friendly” recruits.* Resist looking only to that convenient source of friends and acquaintances of current directors. Explicitly agree to look for unknown as well as known candidates to avoid getting into a rut with a group that might tend to become clique-ish and isolated from the membership. Avoid the “just-like-me” syndrome.
- *Give high priority to the needs of board members.* Cater to the special needs of each director and try to accommodate them when setting meeting times and places. You might rotate the meeting locations to allow each volunteer to meet close to home periodically.
- *Allow for turnover every year.* For example, you might use a three-year term but stagger the terms of different board positions so that they begin in alternating years, ensuring some turnover each year. (The NCUA bylaws require that approximately an equal number of regular terms expire each year.)
- *Define your required skills.* Determine the skill sets you desire, then seek prospective volunteers who possess them.

Your recruiting philosophy provides a foundation on which you can create your recruiting plan.

A Recruiting Plan

If your credit union for some reason had to replace its entire board next week, what would you do? John Dolan-Heitlinger, CEO at Keys Federal Credit Union, Key West, Florida, suggests asking that question to get people

thinking about exactly what their credit union board should look like. He says it’s the most important question that board members can ask themselves in a world in which financial services organizations change rapidly and are intensely competitive. To survive, credit unions have had to change and expand their fields of membership. Credit union boards must represent their members and must keep changing to accurately reflect their growing and shifting memberships. New directors must be brought onto the boards; therefore, strategic recruitment is vital to the survival and success of credit unions.

This view of recruiting is part of a model that Dolan-Heitlinger and other credit union leaders are advocating, called Policy Governance[®], created by John Carver, author and consultant in the area of governance and board leadership. The model is built on 10 principles, outlined in several of Carver’s publications, including *Basic Principles of Policy Governance* (see appendix C). According to Carver, boards first must work hard to define themselves and recognize their responsibilities. A major part of that is strategic recruitment, by the board, for the board. Some of the materials that follow reflect Carver’s model, as will be noted.

If your credit union is a large one, you may have a nominating committee charged with managing the recruiting process for the board. In smaller credit unions, the job might fall to one person or a committee. Details of how you plan the recruiting process are also affected by your own needs and style of managing. However, here are im-

portant rules that can be applied to the process, and they can form the rough outline for a recruiting plan.

Study the membership and determine the ideal composition of your board. Carver states that “the primary relationship the board of directors must establish, maintain, clarify, and protect is its relationship with its ‘owners.’ A board cannot carry out its responsibilities without determining exactly whom the ownership includes and how they can be heard.” Your board should actively seek candidates who represent the members. From the credit union database, you can put together a demographic profile of the membership. Categorize it by age group, gender, race, occupation, and other factors you want to consider. If you want to find out more about a particular segment or try to spot trends, you can do targeted or general surveys and further analyze the numbers to see how they have changed over time.

It’s crucial to keep in touch with the needs and preferences of members, as well as to have data on their composition. This is another reason to conduct a survey—by mail, in the lobby, or by some other means. To recruit volunteers, you must be aware of what motivates them. For example, you might decide to target young professionals for recruitment, and your surveys might tell you that one of their prime concerns is finding time to volunteer when their main priority is to develop their careers. You can adapt your efforts to cater to that concern, as you’ll see when we discuss recruiting techniques further on in this chapter.

With this survey information, you

can decide which, if any, segments should be targeted for recruitment, and whether any segments are over-represented on the board. While it’s important for the board to reflect the diversity of the membership, it’s equally critical to avoid tokenism—that is, avoid looking at only one characteristic of a candidate when recruiting. Directors must represent the interests of all members, rather than those of any one group. Diverse backgrounds on the board, and on key committees such as the supervisory and credit committees, bring the complete picture of the membership to each meeting.

Define the responsibilities of board members in a written job description.

Job descriptions are useful to everyone—directors, volunteer leaders, and potential volunteers. The requirements of the director position should be analyzed periodically and written into a new or existing job description. Recruiters will then know clearly what they need in volunteers, and volunteers will know what they are getting into.

The traditional board job description states the director’s responsibilities, major activities such as meetings and reports, what skills are required, how much time it will take, and what training and other kinds of support will be available. A sample job description is shown in figure 1.2.

Carver’s Policy Governance model offers an interesting alternative view of job descriptions. Carver argues that while traditional job description content is not wrong, the description should be written more broadly. He states that “using activities as the

beginning point for describing the board's job actually sabotages board leadership. It is possible for boards to carry out all the activities prescribed by the conventional wisdom and still fail to fulfill a useful organizational role." Thus, the board job description should focus on the board's products rather than on processes or activities. Those products are

- The credit union's linkage to its members;
- The board's governing policies; and
- The assurance of CEO performance.

The job description would be relatively simple and spell out those three products for which the board—and therefore each board member—is responsible. For a more detailed explanation of this application of the Carver model, read his book *Your Roles and Responsibilities as a Board Member* (see appendix C).

A well-written job description can be a powerful recruiting tool. You might be able to update and rewrite your current director job description to make it more effective. Consider asking your directors to write descriptions of their jobs and to update them periodically as part of an ongoing system of recruitment.

Analyze the current board of directors. Complete a profile of your current directors using information from your database and from board members. Consider factors like age, gender, race, disabilities, special skills and strengths, and interests and priorities of the volunteers. If your profile doesn't exactly reflect the membership, you

might plan to target one or more underrepresented groups when recruiting board members. With this analysis, you also learn about the strengths of your directors and how they match your updated job description. You might decide to target recruitment to supply strengths that are missing on the board. Finally, your profile will tell you about the needs and preferences of current directors, and whether they are being satisfied. As a result, some might choose to change their focus or to resign. Such changes certainly will play into the overall recruiting plan.

Identify sources for recruits. Large credit unions often have enough volunteers, but your credit union may not be so fortunate. If you need to look for board members, consider these options:

- Put a notice in your credit union and/or sponsoring organization's newsletter calling for volunteers.
- Put the same announcement on your Web site.
- Mail the announcement in members' monthly statements.
- Send it as a special mailing in a letter to members.
- Post the call for volunteers in the lobby.
- Work with the human resources department of your sponsoring organization to find potential volunteers among employees.

Boards are taking a more strategic view of recruiting to create a board that reflects a changing membership. If you find you need to make changes in your board and you want to take a more targeted approach to finding

Figure 1.2**Sample Credit Union Volunteer Job Description****Our Town Credit Union Board of Directors Job Description**

Title: Director
Reports to: Members
Supervises: Chief Executive Officer (CEO)

Primary Functions

To provide governance for the credit union in the following manner: to set policies; plan the credit union's strategic direction; ensure the safety and soundness of the credit union; ensure that the mission of the credit union is carried out; maintain open communications with members and management; select the CEO and direct and review the CEO's progress in achieving goals and objectives; and report to the members as required by law.

Specific Duties

- Work with the CEO and other board members to develop the mission, vision, strategic plans, and long-range objectives for the credit union.
- Represent the collective best interests of the members of Our Town Credit Union.
- Ensure that the credit union adheres to pertinent laws, regulations, and sound business practices by establishing boundaries within which the CEO may operate and establish operational procedures.
- Ensure the credit union maintains sound financial conditions and appropriate asset equity management, and that the credit union's assets are protected against unauthorized borrowing and investing.
- Provide for bonding and other security factors, including internal control procedures.
- Approve the credit union's annual budget and strategic plan.
- Engage the CEO, define the scope of his or her duties, review progress in attaining the prescribed goals and objectives, and if necessary, dismiss him or her.
- Annually review and approve policies for lending, investments, asset-liability management, security, disaster recovery, technology, annual business plan, insurance, and others as needed.
- Prepare for and attend all board meetings, planning sessions, and the annual general meeting.
- Identify, cultivate, and prepare for future board leadership individuals whose participation will enhance the board and credit union.
- Represent Our Town Credit Union in the community.
- Annually review the board's performance and take steps to improve it.

Job Prerequisites

- One year minimum membership at Our Town Credit Union.
- May not currently be an employee of Our Town Credit Union.
- May not have been dismissed for cause by Our Town Credit Union.
- May not have caused any monetary loss for Our Town Credit Union.
- May not be currently delinquent more than 60 days on any Our Town Credit Union loan.
- Must be bondable.
- Must believe in the mission of Our Town Credit Union.

board member candidates, consider these ideas:

- Ask those directors who agree that change is needed to suggest candidates.
- Ask a well-respected member for a list of three names of potential candidates.
- Recruit from the under-represented segments of your membership.
- Review feedback letters of complaint and go to these members for suggestions, or find out if they would make good volunteers.
- Cooperate with organizations that you consider to be most effective, and share candidate lists and ideas about recruiting.
- Use professional organizations such as trade associations, service clubs, and organizations of retired professionals.

To optimize your search, combine all of these approaches. Use plenty of publicity and actively solicit your membership. If you don't have a nominating committee to organize this process, consider forming one. Only about 7 percent of credit unions formally employ such a committee, according to a study titled *Credit Union Boards and Credit Union Effectiveness*, sponsored by the Filene Institute. The study found a positive relationship between credit union effectiveness and the use of a nominating committee.

When you have compiled a list of sources, it's time to put all of the planning information together and begin applying recruiting techniques to bring in candidates. The part of the planning process covered to this point is summarized in figure 1.3.

Effective Recruiting Techniques

Building your board strategically means actively recruiting the candidates you desire. Here we do a quick survey of recruiting techniques found to be effective by credit union recruiters. Choose and apply techniques carefully, and tailor your approach to each candidate. Think about motives for volunteering discussed earlier in this chapter, and try to learn what motivates each of your potential candidates as you decide what technique to use in recruiting.

Here are tactics to consider:

- *Make use of job descriptions.* If you use some creativity, you can turn these documents into advertising pieces to attract good candidates. Be honest in listing all responsibilities and requirements for the job, but stress the positive aspects—the social nature of volunteering, the chance to learn and further one's career, and the prestige one can gain.
- *Make use of your call for volunteers.* Just as with the job description,

Figure 1.3

The Recruiting Plan

1. Study the membership and determine the ideal composition of your board.
2. Define the responsibilities of board members in a written job description.
3. Analyze the current board of directors.
4. Identify sources for recruits.

use the announcement calling for volunteers as a sort of advertisement. Again, be forthright about the requirements, but stress the positive aspects. Rely on these devices when talking with potential board members.

- *Use special invitations.* Susan J. Ellis writes in *The Volunteer Recruitment (and Membership Development) Book* that people don't volunteer primarily because "they do not feel they were asked." Consider sending personal signed letters of invitation to the people you want to recruit. Follow up the letter with a request for a meeting between yourself, the candidate, and another credit union volunteer or employee.
- *Serve your candidate's needs.* If, for example, your candidate is focused on career development, try to fill that need and provide training that will serve that purpose.
- *Stress the support that board members receive.* Show candidates the board manual or other support materials that you give to volunteers. Offer to connect the candidate with an experienced director who can serve as a mentor.
- *Create one or more "associate director" positions.* If you have attractive candidates who cannot commit to running for election in the immediate future, suggest an **associate director** or **director-in-training** position, in which the person attends board meetings and takes part in discussions but has no voting power. (This position is discussed more fully in

chapter 4.)

- *Promote the benefits.* Describe the benefits a board member enjoys—both the general benefits described earlier pertaining to professional growth and the more specific benefits. For example, directors go to conferences and credit unions can pay their travel expenses. (Consult the bylaws for restrictions on benefits for directors.)
- *Stress the service aspect of credit unions.* According to a survey of directors conducted by Korn/Ferry International, an executive search firm, directors are likely to consider the ethics of a company and the contributions it makes when they are considering taking a seat on the board. Credit unions must stress their contributions to the community when recruiting directors.

Overcoming Objections

As important as attracting volunteers and selling them on the positive points of volunteering is the need to overcome their objections. Most candidates at some point in your conversations are going to say, for example, that they are pressed for time. Since you can't give them more hours to spend, you need to help them be efficient. For example, reschedule meetings, if possible, to meet their schedules. As much as possible, serve their needs while asking them to serve yours. Here are examples of techniques you can use to overcome objections:

- If a volunteer with family obligations could get some work done at home, make it possible by provid-

ing software or other resources.

- If the candidate is concerned about liability, stress that the credit union will provide the necessary insurance and training to lower the risk of litigation.
- To address inconvenient meeting times, try varying the times, holding one meeting during the day and the next one at night. Rotate the locations to cut down on total driving time for each volunteer.
- If your candidate must balance family obligations with volunteering, look for ways to assist with child care.

Essentially, the key to overcoming objections is to be flexible. You're unlikely to be able to provide resources to meet everyone's needs, but with creativity, you can stretch your resources and use them to serve as many needs as possible.

The Ongoing Process

As we stress throughout this module, the process of recruiting, orienting, and retaining board members is continuous. If you wait until the

months before the board election to start recruiting, you will be frustrated and you'll likely fail to find qualified candidates. Rather, make recruiting a part of your average day. Encourage directors and managers to recruit actively as they travel, meet members, and socialize within the community. In fact, some credit unions are now revising their policies to require directors to find new volunteers.

One way to make recruitment a daily habit is to keep in touch with the many recruiting resources available to credit unions. For example, one source of information on recruiting is BoardSource. Its Web site, *www.boardsource.org*, includes information about board building, along with access to an online magazine and bookstore and to workshops. We introduce other such resources later in this module.

In recruiting candidates for the board, you can invest a lot of time and other resources. You will want to make the right decisions to get the best return on your investment by ensuring a smooth election process—the subject of the next chapter.

