

## Strategic Questions for Vetting Potential Board Candidates©

Asking strategic questions and listening to understand are two powerful relationship-building techniques. Well framed questions uncover critical information, build rapport and trust, provide insights and help potential candidates “sell themselves” on helping your institution by investing their time, talent, treasure, wisdom, and networks.

The questions below are designed to find out whether or not the potential candidate has some or all of the “Must Have” competencies, qualities, and behaviors you desire in all of your board members. Ideally, you ask these questions over time, long before the recruitment conversation, as you productively engage the potential candidate.

Some tips: This is a relationship-building conversation not a job interview. No matter what, you want to walk away with a friend to the institution. You should speak 30% of the time and she should speak 70% of the time. Be an active listener. Unpack answers by asking follow-up questions like “How so?” “Can you say more about that?” “How did that come about?” “What happened next?” Enjoy!

**“Must Have”** -- *These will stay consistent over many years, regardless of your vision or strategic business plan and should be true of 100% of your Board members no matter what else they bring to your school.*

- Ethical** – is honorable in actions and exhibits moral courage  
*“I get so dismayed when I read about some of the scandals in the government, corporate sector and, even in the not-for-profit sector. It makes me wonder about how we are teaching young people about ethics. What have you seen that works?”*  
*“How have you shared your ethical approach to decision-making within your family (on your work team) (on the boards you serve on)?”*  
*“That sounds terrific. Can you give me an example?”*  
*“But what does one do when the stakes are really high and you have to go against a President (head of school), or fellow trustee?”*
- Passion for the mission** -- knows, understands and believes in your mission, vision for the future, and the values that underpin your work  
*“I believe so deeply in education (educating girls in math and science) (providing access to education). But I’m not sure that the general public knows enough about us and our approach (but I’m not sure enough of our alumni know enough about our vision and strategic plan). What are your impressions of (our vision, plan, big ideas)?”*  
*“What impact do you believe we’ve had in the community (region, country, world)?”*  
*“As you learned more about our (vision, strategic direction, big ideas), what impact do you believe we can have going forward?”*  
*“How important is that to you personally?” “Why is that?”*
- Is willing to make your institution one of his or her top three philanthropic and volunteer priorities (or it already is)**  
*“There are lots of ways to make a difference but I decided (my spouse and I decided) (my family decided) to focus the time and money we invest in a small number of organizations. How do you and (your spouse) (family) (company) (foundation) think about this?”*

*“Making time for volunteer work is a challenge. How do you fit it in?”*

*“How did you decide on the top three organizations you give time and treasure to?”*

*“Where does our institution fit? (“Where do you see us fitting going forward?”)*

*“What needs to be in place for you and (the other decision makers) to make a particular organization the focus of your time and philanthropy?”*

*“What do you expect from the organizations in which you invest?” “How well are we meeting your expectations?”*

4. **Generous, philanthropic donor** (regardless of ability level, generous as a function of their personal means) – understands the role of philanthropy in the financial health of (schools, colleges, universities); gives generously to a variety of other charitable organizations (as well as to your institution)

*“I came to philanthropy (late in life) (through my parents’ example) (whatever is true for you). How did you learn to be generous?”*

*“Of all philanthropic investments you’ve made, which have given you the most pleasure?”*

*“Tell me about it.”*

*“Would your spouse (family) choose the same?”*

*“What would they (he) say?”*

*“How do you see philanthropy, at all levels, solving some of our more intractable problems (solving problems like the ones our (faculty, students, alumni) are trying to address?)?”*

*(The questions asked for item number 3 above, will also help you here)*

5. **Willing to question the status quo** – is willing to ask tough questions; “face the brutal facts” as Jim Collins recommends in “Good to Great.”

*“There is such a fine line between having enough information to make good decisions and meddling in administrative details. Our board sometimes struggles with this. In your experience, how do you decide what you need to know and what is best left in the hands of the (President, Head of School) and staff?”*

*“I read (heard) about a trustee who had to challenge (A friend shared with me about a trustee who had to challenge) (On a board I used to serve on we had to challenge) the strategic direction the (President, Head, CEO) wanted take. That can be so difficult. Any advice for how a trustee can do that well?”*

6. **Has humility and will to succeed**

*(All the previous questions will give you a strong sense of whether or not the potential candidate has humility by how she speaks of her contributions and how he shares his ideas and advice. But here are two others that might help.)*

*“I believe our school is poised for even greater success but I do worry about our strategic agility and resilience. How should schools like ours, ensure we are anticipating and prepared for whatever bumps in the road are sure to come?”*

*“When you were (in a leadership position either work or volunteer related), what were some of your biggest challenges?”*

There are many other competencies, attributes, skills, and behaviors you are seeking. We framed these strategic questions to get at some of the most difficult to uncover in a comfortable way. If you would like a complete set of board criteria or want to learn more about building a high performing strategically composed board, contact us at 914-428-7777 or [mail@theosbornegroup.com](mailto:mail@theosbornegroup.com). Visit us at [www.theosbornegroup.com](http://www.theosbornegroup.com) for FREE podcasts, tools, blog posts and videos. Like us on **FACEBOOK**. Connect with us on **LinkedIn** Karen Osborne, Robert Osborne, Jr., Yolanda Rahman and Laurel McCombs. Follow us on **TWITTER** @kareneosborne, @bobosborne17.

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