



Step 7: Board Interest Form Pinwheel Instructions

The Board Interest Form (formerly the Board Application, previously an Event) is now available as a Recruitment Campaign template in Pinwheel for councils to use to recruit board members. As a Recruitment Campaign councils can convert applicants to person records seamlessly in Pinwheel and review submissions under Management > Reports.

Important: Once a Board Interest Form is submitted, it's handled just like the coach volunteer campaign; if it's *accepted*, a person record is created. In the Board Interest Form, the role of Board Member is added to the new person record with a board member status of Potential. Only once a term is added under the board member tab will the board member status become "current". If the application is not accepted, then a person record is never created. This new approach will prevent councils from having to change the person's role.

If councils are currently using the Board Application (Event) and wish to continue using, you may update the wording to reflect the improvements made on the Board Interest Form. If your council does not use Pinwheel for board recruitment, you may use this Board Interest Form as sample language for your recruitment efforts. With all the new improvements to the Board Interest Form and the functionality benefits of the recruitment campaign, it is highly recommended to use this option moving forward.

Below are the primary areas on the new Board Interest Form that councils may want to personalize. Prior to personalizing the Board Interest Form be sure to complete the Board Matrix and update the Board Member Position Profile and Board Member Expectation documents to align with your current needs.

Volunteer Details

Setup > Standard Questions > Volunteer Details

- Personalize the introductory text
- Councils can hyperlink the Board Member Position Profile and Board Member Expectations documents to this introduction to provide additional information about board service
- Personal information may be edited or added

Additional Volunteer Information

Setup > Custom Questions > Additional Volunteer Information

- Race and Ethnicity and Past Participant questions are required by GOTR HQ for reporting purposes
- Other questions may be edited or added

Short Answer Questions



Setup > Custom Questions > Short Answer Questions

- These four short questions are designed to establish and foster a welcoming and inclusive conversation between the candidate and the nominating committee.

Occupation

Setup > Custom Questions > Occupation

- In order to be more inclusive of life experiences, the title “employment” has been intentionally removed.

Experience

Setup > Custom Questions > Experience

The first question, “Do you have any experience in the following areas” can be updated by clicking the “Answer Options” section of this question and editing the provided list.

The screenshot shows the 'Board Member Interest Form' interface. The left sidebar contains navigation options: Recruitment Dashboard, Setup, Settings, Standard Questions, Custom Questions (highlighted), Messages, Waivers, Activities, Store, Donations, Web Pages, and Management. The main content area has a 'Save' button and 'Cancel' and 'Delete' buttons. Below these are tabs for 'General' and 'Answer Options' (highlighted with a red box). The 'Answer Options' section includes a 'Question Text' field with a rich text editor (bold, italic, underline, font color, background color, link, unlink, code) and a text area containing the question: "Do you have experience in any of the following areas? Select all that apply." Below the text area is a 'Campaign Roles' field. At the bottom, there are four checkboxes: 'Publish this question?' (Yes), 'Include in Reports?' (Yes), 'This question is required?' (No), and 'Report Label' (Experience).



Option Text	Display Order ↑	Published?
Event Planning	1	Yes
Finance/Accounting	2	Yes
Fundraising	3	Yes
Human Resources	4	Yes
Leadership Roles	4	Yes
Non-profit sector	5	Yes
Legal/Risk	5	Yes
PR/Marketing	6	Yes

The second question, “Girls on the Run <insert council name> Board of Directors is seeking Board Members with experience in the following areas. Select all/any that apply” **must be updated** to reflect the experiences your board is specifically seeking. The dropdown menu in this section is currently blank.

Girls on the Run <insert council name> Board of Directors is seeking Board Members with experience in the following areas. Select all/any that apply. < council add specific experience/interest areas based off of the Board Matrix results in the "Answer Options" tab >

Please add specific experiences/interest areas that your board is seeking based on the findings from the Board Matrix and add under “Answer Options”. This is a great place to be specific, honest and transparent with your needs.



Recruitment Dashboard

Save Cancel Delete

General **Answer Options**

+ Add Option Value

Option Text	Display Order ↑	Published?
XXX	1	Yes

Communications

Setup > Custom Questions > Communications

- Text Message: While it is not required to capture the text message permission question at the time of submitting this form, if you proceed with the candidate you will want to identify another method to collect this information. GOTR HQ recommends keeping this question here for efficiency.

Information Panel

Setup > Message > Information Panel

The informational panel is a side bar to the right on every page of the Board Interest Form. Be sure to update the Contact Name, Email and Phone as well as any additional information you would like to be present. Keep the additional information short and concise (ie: deadline to apply if applicable, website address, etc.)



Board Member Interest Form Search...

Recruitment Dashboard Save Cancel

Setup

Information Page Description **Information Panel** Registration Process Confirmations

Settings

Standard Questions Yes Show contact information?

Custom Questions

Contact Name Add Contact Name

Contact Email addemailhere@girlsontherun.org

Contact Phone (000) 000-0000

Information Panel Text

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Add additional information here.

Banner

Setup > Messages > Registration Process > Top of All Pages Banner

The banner is on the top of all pages. Edit the text in this section to include who to contact for questions, information, etc.

Board Member Interest Form Search... ?

Recruitment Dashboard Save Cancel

Setup

Information Page Description Information Panel **Registration Process** Confirmations

Element

Registration Not

Open Yet

Top of All Pages

Banner

First Page Banner

Checkout Page

Registration Closed

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If you have questions regarding the board member experience, please contact (insert name, email and/or phone number).



Confirmation/Email Receipt

Setup > Messages > Registration Process > Confirmation Page/Email

After the potential candidate submits the interest form, they will receive an automatic email receipt. Make sure to personalize and utilize this function. This feature allows you to communicate important details such as when they can expect to hear back and where they can learn more about all the ways they can be involved with your council.

The screenshot shows the 'Board Member Interest Form' configuration interface. The left sidebar contains navigation options: Recruitment Dashboard, Setup, Settings, Standard Questions, Custom Questions, Messages, Waivers, Activities, Store, Donations, and Web Pages. The main content area is titled 'Board Member Interest Form' and includes a search bar and a 'Confirmations' tab. The 'Confirmations' tab is active, showing a 'Confirmation' element with a 'Page/Email' type. The text content is as follows:

Thank you for submitting a Board Interest Form for the Board of Directors for Girls on the Run XXX. With our core values top of mind, this process aims to embrace our differences and find strength in our connectedness and recognize our power and responsibility to be intentional in our decision making.

Upon reviewing your Interest form a representative from our council will reach out to you in 7-10 business days to schedule a conversation. In the meantime, be sure to check out other opportunities to become involved in our council by visiting our [start a site page](#), [become a coach](#), and [general volunteer opportunities](#).

With Gratitude,
Girls on the Run XXX