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Developing a dynamic board, like preparing a delicious nine-course meal, requires following a great recipe made with the finest ingredients. This issue of *Arts Insights* focuses on the essential steps for developing a board that really cooks. First, arts and culture organizations must consider the best places to find strong candidates, how to select culturally and socioeconomically diverse members, and how to properly prepare trustees with effective orientation techniques. Next, they must reflect on how to stir in strategies that engage and educate board members about organizational, community, and industry dynamics. Finally, savor a taste of evaluation techniques that celebrate board and individual member accomplishments while toasting an effective rotation and leadership succession plan that allows the board to improve with age. This article will also serve up a menu of ways to show appreciation to the trustees who give arts and cultural organizations their special flavor.

Finding the Right Board Prospects

The first step in finding a new board member is to take stock of existing resources. A board development or nominating committee can **identify** the skills and abilities of the existing board and determine what new resources are needed to advance the organization's mission and vision, and thus embrace its strategic plan. In addition to the underlying need for board members to provide connections to cognitive and financial resources in support of the organization, what other skills, experience, or diversity issues need to be addressed? What past experience and accomplishments serving on other nonprofit boards should prospects have that would add value? Some organizations use a simple chart that considers its existing board by demographics and expertise, giving a view of what is missing from the mix of personal and professional connections, community and organizational commitments, and capacity to support purpose and programs.

Are there people in the existing audience or donor base who have a passion for the organization and its impacts? Do they share values in how the organization, audiences, and community interact with and value one another? Is there a corporate entity that is interested in having a close affiliation? Keeping all these in mind could uncover a dynamic board prospect who is aligned with the mission, vision, and values as well as the overall policy, governance, and community ambassadorship needed for the organization. Better to have a small, fully functional board than an ineffective, large one. Ultimately, recruiting board volunteers can be thought of in the same way as recruiting high impact employees—what time, talent, and treasure do they bring to the table? Do they have the connection, commitment, and capacity to make a difference? In these examples, treasure and capacity go far beyond the financial to areas of cultural and socioeconomic diversity, community and professional knowledge, and any number of additional areas defined as critical for the organization and the community it serves.

Once a thoroughly reviewed pool of prospects is found, those closest to the prospect will need to **cultivate** their interest. Discussions with artistic and executive leadership must occur to ensure all parties are ready for a fruitful working relationship. Cultivation tools may include inviting prospects to special behind-the-scenes events with artists, lunches or private meetings with artistic and administrative leaders, or attending a concert or exhibition opening with existing board members. The prospective board member must also receive full disclosure of any major issues that will impact the board and organization, including its programs, financial position, schedule of meetings, board member roles and responsibilities, and any other significant challenges ahead. Confidentiality of sensitive information is critical as these prospects have not yet been elected to the board. Exploring a board prospect's interest while sharing organizational information is a delicate balance. The end result should allow the nominating committee to confidently report to the board that a prospect is ready, willing, and capable to serve.

Finally, it is time to **recruit** the prospect by asking them to serve on the board. This occurs after the nominating committee has made its recommendation to the full board, and the board concurs that a prospect adds new perspectives that are needed. The prospect must feel comfortable with the decision to join, and the organization must know that the prospect is fully committed. Typically, the primary board member who guided the cultivation process works in tandem with the board chair to formally invite the prospect to join.

Orientation Time

It is now time to ensure the newly elected board member has a deeper understanding of the board's communication dynamic and the organization's pressing priorities. Any external forces affecting the group, such as collaborative partnerships with other entities, need to be fully explained. To **orient** the new board member, they should receive an extensive board handbook, which is discussed shortly after the election. A thorough board handbook includes:

- Organizational bylaws and articles of incorporation
- Organizational chart and staff and board member listings, including biographies and contact information
- Terms of board members and officers
- Calendar of board and committee meetings and minutes and financial reports from recent board meetings
- Roles and responsibilities of board and committee members
- Strategic plan
- Audited financial statements
- Board policies related to ethics, conflict of interest, legal liability, and reimbursements
- Contributed income goals, sponsorship policies, or other information needed to serve as effective community ambassadors and approach prospective donors
- Donor listings that provide opportunities for board members to thank donors
- Program books, newsletters, website, and other public organizational information

A successful orientation process, however, requires not only the cookbook but also guidance on which recipes and ingredients are most important. It can take up to a year to fully **educate** new members with the knowledge other board and staff members have amassed over time. Act as teachers and coaches, asking for and giving assistance to strengthen the bonds that tie board resources together. A more experienced board member, or the new board member's closest advocate, should be considered a mentor throughout the first year. It is ultimately the existing board's responsibility to ensure all members are oriented properly. The senior executive and artistic leaders should also maintain close contact with the new board member throughout the process.

Keep the Board Engaged and Informed

How do arts and culture organizations **engage** board members? Typically, board members feel engaged once their volunteerism and contribution to the organization is recognized. Committee work is a good way to get started and keep momentum. It improves overall communication and distributes the workload. Every board member provides a unique perspective. Celebrating and embracing these talents will excite the new board member and keep them engaged. Simultaneously, continuing to educate and inform the new board member about the challenges the organization faces will be important in ongoing engagement. This includes information on programs, finances, marketing, fundraising, community affairs, education, and details on the importance of their roles as ambassadors in the community. In this stage, the board chair and senior leadership need to make a point of asking new board members if they have questions or to provide input on various issues. Many new board members are hesitant to become publicly involved in the presence of more experienced members yet are willing to share their perspectives privately. New board members are invited to join for a reason and eliciting their feedback will bring about a well-balanced discussion, new perspectives, and invaluable connections.

Evaluate Effectiveness

One area that is not often addressed is the formal evaluation of the board's effectiveness—as a whole and individually. Everyone gets so busy that they forget to **evaluate** progress. More visionary organizations take a global approach in evaluating themselves at an annual board summit. This approach allows an organization to live in the present while simultaneously learning from the past and looking to the future. Typically, this process involves reemphasizing the organization's mission, vision, goals, and objectives in order to evaluate internal strengths and weaknesses while balancing these against the existing external opportunities and threats. This is the time that the strategic plan is updated as part of its ongoing evolution. Perhaps more importantly, this time allows the board to set its own specific, measurable, attainable, reviewable, and time-sensitive (SMART) goals in conjunction with those being established for the organization as a whole.

Individual board members also need to be assessed annually. A simple scorecard kept by the president, secretary, or nominating committee chair can track meeting and event attendance and level of overall board giving and participation. Discussions with other members are important in gathering information on how each board member is feeling about their involvement while providing objective feedback. Remember, board service is not just about what the organization needs. Board members are also seeking invaluable experiences and resources for their own personal and professional development.

Rotate Board Members

There are times in every organization when the board can become stagnant. Members lose energy or momentum. Meetings focus on minutiae instead of the bigger picture. How can this pendulum be pushed in the other direction? Rotating board members to different committees or alternative projects can refresh interest, cultivate new leaders, and energize an organization with new ideas through an effective succession plan. It is also important to **rotate** members off the board entirely, at least for a brief period, allowing time to, reassess their interest in the organization and consider how they might come back in the future with renewed spirit. Most organizations have multi-year terms of service for board members, at which time they must be reelected. Additionally, many leading governance policies establish term limits such as “no board member may serve more than three consecutive three-year terms.” This allows for an organization to diplomatically ask a board member to take at least a one-year hiatus from the board. These rotation policies can keep the board vibrant while creating opportunities for new people and perspectives.

Celebrate Success

Taking time to **celebrate** organizational victories with new and current board members, and those who have played a part in that ongoing success, is critical in keeping a positive social and emotional board attitude. As volunteers, board members often do not immediately recognize the results of their participation. There are times when board service can feel more like work than joyful volunteerism. When things go well, celebrate! Recognize the things that did not go well but within the context of the many more things that advanced the organization. Dynamic organizations learn as much from their mistakes as they do from successes. As board members depart the organization, thank them profusely for their participation and maintain a solid connection with past board members, as they could play an important role in the future. Regularly recognize the achievements and accomplishments of individual board members and the collective group. Thank them privately, publicly, and repeatedly!

Conclusion

There are many tools, forms, charts, and ideas that were not included in writing this article about five-star boards. This edition of *Arts Insights* is meant to be an appetizer in creating an organization’s nine-course feast, with board members celebrating together. The ingredients may vary but the outcome will be a memorable board experience that strengthens organizational infrastructure and resources, increasing its impact throughout the community.

Note: The above was adapted from *The Board Building Cycle, Second Edition: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members*, Berit M. Lakey Ph.D., BoardSource, 2007.



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Dr. Thibodeau founded ACG in 1997 and, as its President, has been embedded in numerous projects in all practice areas to grow institutional sustainability, advance the arts and culture sector, and enhance communities served by this vibrant industry. He has guided hundreds of clients in achieving effective leadership transitions, planning cultural facilities, increasing revenues, developing dynamic institutional brands and messages, crafting strategic plans and business models, and revitalizing board governance practices. A regular international guest speaker and facilitator, Dr. Thibodeau’s recent conferences and published articles include the Academy of Management; Social Theory, Politics, and the Arts; *International Journal of Arts Management*, and *The Journal of Arts Management, Law, and Society*. Published and presented articles include “Bonds, Boundaries, and Unexpected Transformations: Exploring the Performativity of Stakeholder Interactions in Nonprofit Organizations,”

“Nonprofit Organizations, Community, and Shared Urgency: Lessons from the Arts and Culture Sector,” and “Overcoming Project Inertia and Gaining Project Momentum: Strategic Adaptation in Cultural Facilities Planning.” He holds a doctorate of business administration from the Grenoble Ecole de Management (France), a master of business administration from the F.W. Olin Graduate School of Business at Babson College, and a bachelor of music from The Hartt School at the University of Hartford. He also has multiple certifications in competencies, communications, and motivations analysis from Target Training International.

Contact ACG today for more information on how we can help your organization with board advancement and organizational development issues.

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