

Creating a Five-Star Board in the Arts and Culture Sector

Dr. Bruce D. Thibodeau, President

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, it is important to 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, abilities, and diversity of the existing board and determine what new resources are needed to advance the organization's mission and vision, and thus embrace its strategic initiatives and community engagement goals. In addition to the underlying need for board members to provide connections to cognitive and financial resources in support of the organization, what other areas need to be addressed? What experiences and accomplishments serving on other nonprofit boards should prospects have and how might that add value? Or do systemic barriers need to be removed to ensure an inclusive board that more effectively represents underserved or underrepresented areas of the community in which the organization exists? Some use a survey and a 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 organizational purpose and programs.

Many other questions may also need to be explored by the board development or nominating committee. 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. If there are no close connections, then an authentic, relational approach is needed. 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 performance 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 result should allow the nominating committee to confidently report to the board that a prospect is ready, willing, capable, and excited 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 and diverse 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 and executive leadership to formally invite the prospect to join.

Orientation and Education

First impressions can set the tone for how the relationship with the new board member will unfold. Ensuring that the newly elected board member has a deeper understanding of the board's communication dynamic and the organization's pressing priorities will be very important. Any external forces affecting the group, such as collaborative partnerships with other entities, need to be fully explained. To **orient** a new board member effectively, an extensive board handbook should be provided as a baseline and discussed shortly after their election. At times, assigning a more experienced board member to the newly elected one can deepen personal relationships and provide greater context than written documentation.

A thorough board handbook includes, in no particular order and is not limited to, the following:

- 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
- Equity, diversity, inclusivity, and accessibility policies for board and staff
- Contributed income goals, sponsorship policies, or other information needed to serve as effective community ambassadors with discussions around the best research about and approaches to 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. As mentioned earlier, 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 welcomed, oriented, and educated properly. The senior executive and artistic leaders should also meet with and maintain close contact with the new board member throughout the process. Listening to what motivates the new board member will be critical to ensuring they are valued, and their perspectives are taken into account.

Keep the Board Engaged and Informed

How do arts and culture organizations truly **engage** board members? Typically, board members feel engaged once their volunteerism and contribution to the organization are recognized. Committee work is a good way to get started and keep momentum. It improves overall communication, creates transparency, and distributes the workload. Every board member provides a unique perspective. Celebrating and embracing these perspectives 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 regularly updated information on programs, finances, diversity initiatives, 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 and allow them to provide input on various issues. Many new board members are hesitant to become publicly involved in the presence of more experienced members, yet they 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 ideas, 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 and to hold themselves and one another accountable. 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 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 face attrition and become stagnant. Members lose energy and ideas, particularly during challenging times where global, economic, social, and technological issues can feel overwhelming. Meetings can sometimes focus on minutiae instead of the bigger picture. How can a board overcome this inertia and gain momentum to move forward productively?

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 in a truly inclusive approach to board building.

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. Particularly when it comes to major gift fundraising, the many people involved in cultivating relationships that result in significant contributions are often overlooked as the people who asked for the gift at the end of a long cultivation process are credited. There are times when board service can feel more like work than joyful volunteerism. When things go well, celebrate regularly! It is important to also 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 make a concerted effort maintain a solid relationship 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. As OPERA America President/CEO Marc A. Scorca writes in *Essentials of Opera Governance*, “Board members exist at both the top and the bottom of an hourglass. At the top (are) the traditional roles of trustees: governance, fiduciary responsibilities, and policy development. At the bottom... you are community ambassadors. You help recruit volunteers, donors, and ticket buyers. You not only contribute, but you help build the donor base. And you participate actively by going to performances, lectures, and workshops.”

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.



Dr. Bruce D. Thibodeau, President

Dr. Bruce D. Thibodeau founded ACG in 1997 and has guided hundreds of nonprofit, university, and government 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. He has also conducted extensive research in a threefold exploration of stakeholders, nonprofit arts management, and cultural facility project management and has facilitated numerous community engagement processes that have increased the public dialogue and stakeholder awareness of the arts and culture sector's value and impact on communities. As both a researcher and practitioner, his expertise highlights the important roles of project champions and followers as they overcome inertia and gain momentum

derived from their social connections, personal commitments, and financial capacities to support the arts and culture sector. Prior to founding ACG, Dr. Thibodeau held various management roles at the Los Angeles Chamber Orchestra, Boston Symphony Orchestra, Hartford Symphony Orchestra, Santa Fe Chamber Music Festival, Price Waterhouse, and Museum of Contemporary Art Los Angeles. He is a regular guest speaker at national and international arts, culture, and academic conferences and has several published papers. Dr. Thibodeau 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.

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**(888) 234.4236
info@ArtsConsulting.com
ArtsConsulting.com**