

Nine Steps to the Board Building Cycle

STEP 1: IDENTIFY BOARD NEEDS • Skills, knowledge, perspectives, and connections, etc., needed to implement strategic plan. • Board needs assessment – What expertise do you have? What is missing?
• Identify the skills/attributes/characteristics current board members have and what are the skills/attributes/characteristics of new board members. (See Board Profile Worksheet)

Questions to consider: What skills have you seen on other boards or groups that might enhance your board? What does your board struggle with? What kind of person might alleviate this struggle? What does your board do well? Do you need that?

STEP 2: CULTIVATE POTENTIAL LEADERS • Ask current board members, senior staff, and others to suggest potential candidates. • Find ways to connect with those candidates. • Get them interested in your organization, and keep them informed of your progress. Create a wish list – Who do you wish was on this board and why?

Questions to consider: Where might you find individuals that possess the skills or qualities listed under step 1? What can you do to get those individuals interested in serving on your board? What have you tried that has not worked? What have you not tried?

STEP 3: RECRUIT PROSPECTS • Describe why a prospective board member is wanted and needed. • Explain expectations and responsibilities of board members, and don't minimize requirements. • Invite questions, elicit their interest, and find out if they would be prepared to serve. • Recruit a diverse board. What Recruitment documents do you use ...JOB DESCRIPTION? Member Agreement? (See Candidate Rating Form)

Questions to consider: What got your current board members to commit? What is personally and professionally rewarding about serving on your board? What three things should a potential board member know about your organization and your board before they decide whether to join the board? What do you expect from your board members in terms of fundraising? What do you expect from your board members in terms of time commitment? What happens if a board member does not live up to these expectations?

STEP 4: ORIENT NEW MEMBERS TO THE ORGANIZATION: • History • Programs • Pressing issues • Finances • Facilities • Structure (organization chart) To the board: • Committee structure • Board member responsibilities • List of board members and key staff • Bylaws • Recent minutes

Questions to consider: What knowledge would have helped you when you started with the board? How did you learn what you needed to know to perform your board functions?



Step 5: INVOLVE • Discover board member interests and availability. • Involve them in committees or task forces. • Assign them a board “buddy.” • Solicit feedback. • Hold everyone accountable. • Express appreciation.

Questions to consider: Have you asked each board member what board work interests them? Are there diverse ways to be involved?



Step 6: EDUCATE • Provide information concerning your mission area and services. • Promote exploration of issues facing the organization. • Hold retreats and encourage board development activities by sending board members to seminars and workshops. • Don’t hide difficulties.

Questions to consider: Have you offered fun/easy ways of learning to board members? 2. How do most of your board members learn what they need to know? Can you add a board education section to board meeting? How can board members learn outside of meetings? Can you email them information?

STEP 7: EVALUATE • Evaluate the board as a whole, as well as individual board members. • Examine how the board and chief executive work as a team. • Engage the board in assessing its own performance. • Identify ways in which to improve. • Encourage individual self-assessment.

Questions to consider: What barriers to evaluation does the organization have? How can they be overcome? What might be done to ensure follow-up from evaluation findings? Do you evaluate meetings, individual performance and overall board performance? What do you do with the findings?

STEP 8: ROTATE BOARD MEMBERS • Rotate board members. • Establish term limits (and enforce them!). • Do not automatically re-elect for an additional term; consider the board’s needs and the board member’s performance. • Explore the advisability of resigning with members who are not active. • Develop new leadership.

Questions to consider: If you are not rotating members, what are the barriers to doing this? How can they be overcome? If you are rotating members, does it seem to be bringing fresh ideas to the organization? Are you recruiting for leadership or seat fillers?

Step 9: CELEBRATE! • Recognize victories and progress – even small ones. • Celebrate accomplishments. • Appreciate individual contributions – to the board, the organization, and the community. • Make room for humor and a good laugh.

Questions to consider: Do your board members like public acknowledgement? Are there awards that your board might apply for? What do your board members enjoy doing with their free time? Are there possibilities for organizing an activity around this? When new members or officers are elected do you send out a press release? How do recognize rotating off members or past presidents?