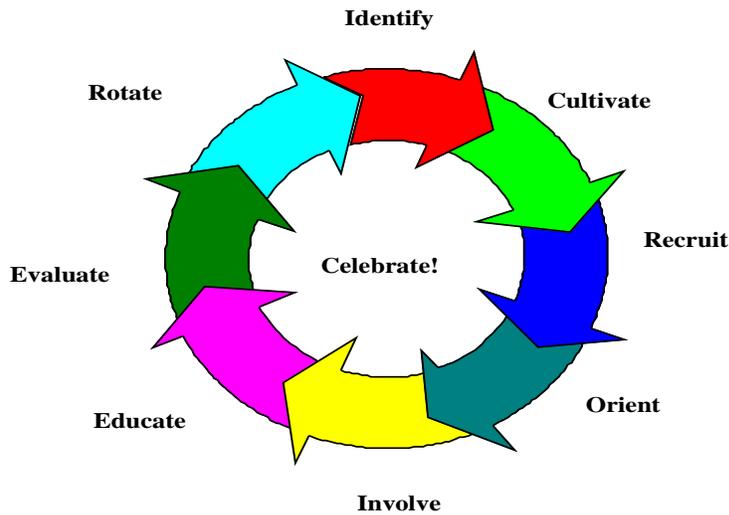


# The Board Building Cycle



**Step 1: Identify** board needs (Skills, knowledge, perspective, connections, etc., needed to implement the strategic plan). What do we have? What is missing? Identify sources of board members with the needed characteristics.

**Step 2: Cultivate** potential board members. Get them interested in your organization and keep them informed of your progress.

**Step 3: Recruit** prospects. Describe why a prospective member is wanted and needed. Describe expectations and responsibilities of board members, and don't minimize requirements. Invite questions, and elicit their interest and preparedness to serve.

**Step 4: Orient** new board members to the organization (program, history, bylaws, pressing issues, finances, facilities and organization chart) and to the board (recent minutes, committees, board member responsibilities, lists of board members and key staff members).

**Step 5: Involve** all board members. Discover their interests and availability. Involve them in committees

Assign them a board "buddy." Solicit feedback. Hold everyone accountable. Express appreciation for work well done.

**Step 6: Educate** the board. Provide information concerning your mission area. Promote exploration of issues facing the organization. Don't hide difficulties.

**Step 7: Evaluate** the board and individual board members. Engage the board in assessing its own performance. Identify ways in which to improve. Encourage individual self-assessment.

**Step 8: Rotate** board members. Consider establishing and using term limits. Do not automatically re-elect for an additional term; consider the board's needs and the board member's performance. Explore advisability of resigning with members who are not active. Develop new leadership.

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

## Example Board Orientation

Information	Issues	Presentation Options
<b>About the Organization</b>		
Program	Offer new board members a feel for the work of the organization — what it does, whom it serves, what difference it makes — to get them emotionally and intellectually connected and motivated.	<ul style="list-style-type: none"> <li>• Tour of facilities</li> <li>• Observation of/participation in program activities</li> <li>• Presentation by client, member, or program participant</li> <li>• Video, slides, film presentation</li> <li>• Verbal presentations</li> <li>• Written materials</li> </ul>
Finances	Help new board members become informed about where money comes from, how it is spent, and the state of the organization’s financial health.	<ul style="list-style-type: none"> <li>• Presentation by chief executive, chief financial officer, or treasurer</li> <li>• Background materials (most recent audit, budget, financials), graphically presented if possible</li> </ul>
History	Provide sufficient knowledge about the past so that the present makes sense. Also, help them see their own participation as part of the organization’s ongoing story.	<ul style="list-style-type: none"> <li>• Stories told by “old timers”</li> <li>• Pictures</li> <li>• Written materials</li> </ul>
Strategic Direction	Present a framework for new members to participate effectively. Clarify the mission, vision, organizational values, and goals that inform organizational actions.	<ul style="list-style-type: none"> <li>• Presentation/discussion led by the chief executive or board chair</li> <li>• Copy of strategic plan (or other documents, especially mission statement, if no plan is available)</li> </ul>
Organizational Structure	Help new board members understand who does what and what the lines of accountability are.	<ul style="list-style-type: none"> <li>• Copy of the bylaws, IRS Determination Letter</li> <li>• Organizational chart</li> <li>• Introductions to key staff members</li> </ul>
<b>About the Board</b>		
Board Roles	Assure that new board members understand the roles of the board.	<ul style="list-style-type: none"> <li>• Presentation/discussion, preferably with the whole board involved</li> <li>• Written materials</li> </ul>
Board Member Responsibilities	Assure that new board members understand their own responsibilities as board members.	<ul style="list-style-type: none"> <li>• Presentation/discussion</li> <li>• Signed agreement (job description), including conflict of interest and ethical statements</li> </ul>
Board Operations	Help new board members understand how the board operates so that they may participate effectively.	<ul style="list-style-type: none"> <li>• Board manual</li> <li>• Board mentors</li> <li>• Committee lists, with committee charges and member lists</li> <li>• Meeting schedule</li> </ul>
Board Members	Facilitate new board member integration with the other members.	<ul style="list-style-type: none"> <li>• List of board members</li> <li>• Board member biographical data</li> <li>• Time set aside for social interaction</li> </ul>