



## ASSETS WORKSHEET

What Assets can you offer your board members? Fill out form with the things you can provide:

### ***Business Development/Meet Influential People***

Networking opportunities:

Access to potential clients:

Email or other promotion to your members, patrons, subscribers

### ***Professional Development***

Skills building:

Leadership or other workshop opportunities

### ***Social***

Events, parties and galas:

Performances:

Opening Nights:

Other social opportunities:

### ***Access to Artists/Behind the Scenes***

Meet the artist opportunities:

Backstage or behind the scenes access:

### ***Make the Community Better***

What does your group do that is unique:

Meet some of the school kids or people you impact:

***Other:***

# CIRCLE OF INFLUENCE

Connections board members have  
that can benefit the organization

**Business  
Associates**

**Friends &  
Family**

**Board  
Member**

**Professional  
Chambers Clubs**

**Personal clubs  
& groups**

**Customers**

**Clients**

## SAMPLE HOW IT WORKS

### Restaurant Owner

Traditional donations to board:

- Host Event
- Donate Meals for auction
- Donate Meals for meetings with donors and members

## CIRCLE OF INFLUENCE

### Who are his connections?

Wine, beer, liquor vendors  
Food vendors  
Customers he can connect with  
Industry colleagues -hospitality  
Neighboring businesses  
Member of a chamber or  
Business association  
Friends  
Clubs  
Interests



## CIRCLE OF INFLUENCE IDEA WORKSHEET FOR BOARD MEMBERS

From the Building a Better Workshop we discussed some of the ways board members can get involved with the organization:  
Contributed to organizations visibility and/or public relations efforts

- Increase audience and/or membership
- Introduce new donors or funding partners
- Provide financial or programmatic oversight
- Contribute to the visioning, strategic planning and overall organizational development
- Contribute to board recruitment and development
- Provide in-kind skills and services to fulfill the organizations mission
- Attend and bring people to events and programs and performances
- Be an advocate for the organization

We also discussed how each board member can expand his outreach and effectiveness for your group by connecting with his Circle of Influence.

### MY CIRCLE OF INFLUENCE

Chambers, Business Associations you are a member of:

*Outreach – hand out board member business cards to contacts you meet at meetings, events and follow up if interested*

Clients that might be interested in this group:

*Outreach – invite clients to events or performances as your guest and follow up if to see if they want to get involved*

Potential Clients that might be interested in this group:

*Outreach – set up a short meeting to tell them about how they might get involved with your group and while there trade business cards and mention your interest*

Colleagues that might be interested in this group:

*Outreach – send information and invitations from the group to your colleagues. Talk directly to those that might be interested and invite to an event or performance. Host a company night for your colleagues and associates at an event or performance for your group.*

Vendors or businesses that might be interested:

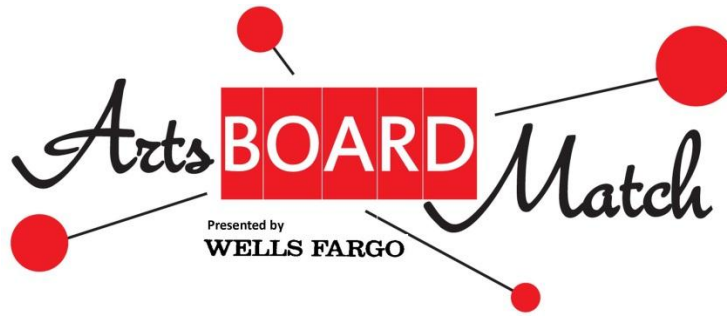
*Outreach – invite clients to events or performances as your guest and follow up if to see if they want to get involved. Don't forget in-kind donations they might be able to provide.*

Friends that might be interested in the group.

*Outreach – invite to events or performances as your guest and follow up if to see if they want to get involved*

Social activities that might bring connections:

Other companies or professionals in my industry that I might reach out to:



From the Building a Better Workshop we discussed some of the benefits business professionals expect when they join a board:

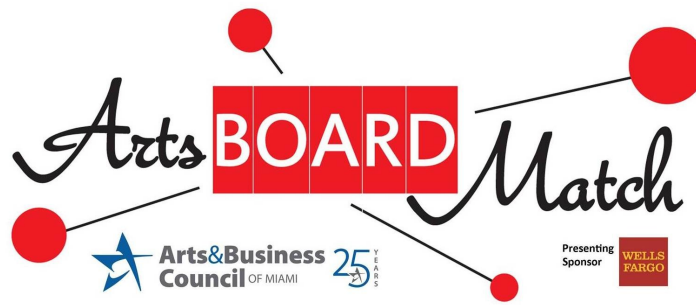
### **BENEFITS**

- Business Development
- Networking
- Entertaining, social
- Professional Development
- Making a difference, advancing the cause
- Behind the scenes Interaction with artists and creative
- Meetings with government officials
- Meetings with other business professionals
- Prominence/prestige

### **SAMPLE CIRCLE OF INFLUENCE FOR ONE BOARD CANDIDATE**

Restaurant Owner

1. host events
2. donate meals for auction/raffle
3. promote your events to his patrons
4. who are his connections?
  - wine, beer, liquor vendors
  - food vendors
  - customers he is close to
  - his industry colleagues in hospitality
  - his neighboring businesses
  - is he a member of a chamber or business association
  - his friends
  - clubs and affiliations



## SETTING GOALS FOR YOUR BOARD WORKSHEET

In today's workshop we have covered what the board does and the various roles the board plays in your organization. Use this form to prioritize what you need your board to accomplish to help your organization move forward. As we discussed not all board members can do all things and not all groups have the assets to attract some qualities.

For this worksheet **Step 1** Check all the roles you want your board to fill. **Step 2** is to select the top 3 or 4 areas that are most important. The needs are your priorities, the wants are things you would like but not a top priority. **Step 3** is to select what subsets in that role are important to you. **Step 4** is to use this information to help refine your board recruitment strategy. You can also use this information to evaluate your current board. Remember, BE REALISTIC!

☐ **Financial Support**    ☐ Need?    ☐ Want?

- ☐ Individual donation
- ☐ Corporate donation
- ☐ Bring in new donors
- ☐ Planned giving
- ☐ Oversee a Power 2 Give campaign
- ☐ Other

☐ **Fundraising**    ☐ Need?    ☐ Want?

- ☐ Host events at their home or office to introduce their Friends and colleagues to your group
- ☐ Introduce staff or other board members to potential Donors or supporters
- ☐ Social media campaigns on behalf of your group
- ☐ Fundraising campaigns on their Facebook or other
- ☐ Host VIP reception before or after performance
- ☐ Increase "circle of influence" for organization

☐ **Outreach/Advocacy**    ☐ Need?    ☐ Want?

- ☐ Represent organization at chamber events
- ☐ Bring groups executives to chamber events
- ☐ Set up speaking engagements with business and community groups for the organization
- ☐ Meet with elected official(s) on behalf of the group

Other

☐ **Governing**    ☐ Need?    ☐ Want?

- ☐ Set policy
- ☐ Planning and strategy to reach organizational goals
- ☐ Bylaws and operating procedures
- ☐ Mission
- ☐ recruit new board members

☐ **Fiduciary**    ☐ Need?    ☐ Want?

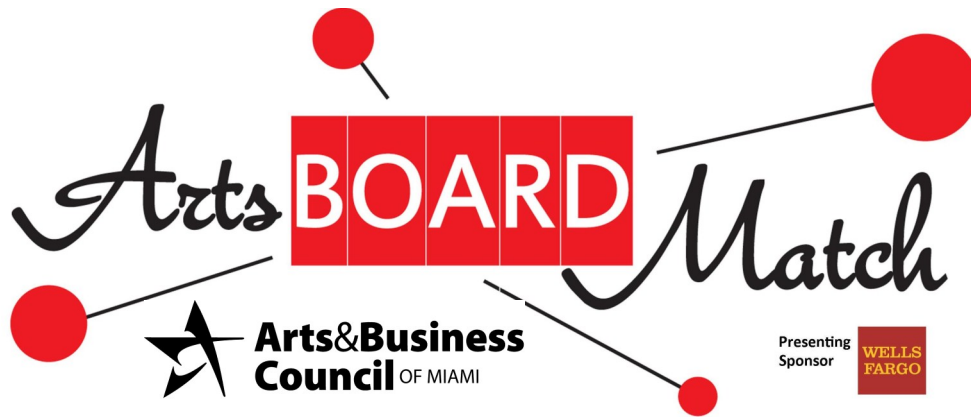
- ☐ Work with staff to set annual budget
- ☐ Track actual vs projected throughout the year
- ☐ Do cost/benefit analysis to see where group might Find cost saving

☐ **Advisory**    ☐ Need?    ☐ Want?

- ☐ Share skills with organization
- What skills do you need? Explain

☐ **In-Kind Donations**    ☐ Need?    ☐ Want?

- ☐ Donate services
- What service do you need? Explain
- ☐ Donate product
- What products do you need?



## OUR BOARD RECRUITMENT STRATEGY

Use the information you received from the Setting Goals for Your Board Worksheet and the Strategic Assessment of Your Current Board and from board discussion.

### Priority #1

Need:

Who can fill this need?

What benefits will the want?

Ideas:

### Priority #2

Need:

Who can fill this need?

What benefits will the want?

Ideas:

### Priority #3

Need:

Who can fill this need?

What benefits will the want?

Ideas:

### Priority #4

Need:

Who can fill this need?

What benefits will the want?

Ideas:



## Questions Prospective Arts Board Members Should Ask

### **Questions**

- Tell me about your programs, performances and events?
- Who attends your programs, performances and events?
- Tell me about outreach activities of the organization?
- What are the ways that you think I can contribute as a board member?
- What is the time commitment of board members?
- How much of my time will be required for meetings and special events?
- What is the board's role in fundraising?
- Will I be expected to make a specific annual financial contribution?
- Who is currently on the board?
- How often does the board meet?
- Is the financial condition of the organization sound?
- Does the board discuss and approve the annual budget?
- How often do board members receive financial reports?
- What orientation will I receive to the organization and to the responsibilities of board service?
- Does the organization provide opportunities for board development and education?
- Does the organization have directors and officers liability coverage?

### **Background Materials**

*Selected background information can provide a useful overview of the organization, the board's work, and the responsibilities of board members. Helpful material you might request at the getting to know you meeting:*

- Promotional materials from recent performances and events
- The organization's newsletter, brochure, or other publications
- Newspaper or magazine articles about the organization, reviews
- Minutes from recent board meetings
- IRS form 990 for past few years
- Current budget
- List of current board members with contact information
- A description of board members' responsibilities

**TIP:** Visit the organizations website to learn more





## SAMPLE BOARD RECRUITMENT LETTER FOR ACCOUNTANTS

Put letter on your letterhead

*Note: directions/instructions or areas to customize are in red.*

Mr. John Doe  
Managing Director  
XYZ Accounting Firm  
1234 Biscayne Boulevard, Suite 1600  
Miami, FL 33131

Dear Mr. Doe:

Arts Inc is *Add two or three lines here about your organization.*

Arts Inc has developed a strategic plan to enhance the growth of our organization. One of our most important goals is to strategically improve our board with the addition of selected companies and individuals. We have a few openings on our board and one of our top priorities is to recruit an accounting firm to join us. Through extensive research we think your firm is a perfect match to partner with our organization. *(Put info here about why it is a good fit – ex: our audience matches the demographics of your clients/customers, we serve the same geographic area, etc.* **We would like to invite XYZ Accounting Firm to consider putting one of your accountant associates on our board.** As a member of the Board, your associate will make a significant contribution and will have a positive impact on our work.

We know that your associate's presence on the Board of Arts Inc will be a positive experience for them and for the organization. The board member and your company will reap tangible benefits by serving on our board:

- Your company will be involved with a premier organization – *put short descriptive info here Ex: one that is leading contemporary dance in South Florida*
- We provide Board members and their companies with opportunities to reach the artists and arts patrons we serve. Each board member is profiled on our website with a link to their company. Your company will have the opportunity to send information about your products or services to our patrons and members. *Change this to fit outreach your arts group provides to board members.*
- Board members have extensive business development opportunities at our performances and events. We also provide a great opportunity for your company to entertain your special clients and colleagues.
- Your associate will be part of a diverse and lively Board of Directors and talented staff - - a team effort. They will have the opportunity to contribute their skills, talents and other resources to us and be rewarded with new skills and contacts.
- We will use your associate's time in a respectful and judicious manner as we realize that the asset of time is one of the most critical resources busy people possess. We will use their time in a meaningful way that will return value to the board member and your company.
- We provide our board members with opportunities for leadership development and to learn new skills through extensive orientation and committee involvement.
- Our board meetings are kept to one hour and all important information is communicated on a timely basis. Board meeting agendas and discussion items are distributed in advance to allow time to read and respond.
- Board members are listed on our letterhead, in our promotional materials and on our website. Board members will be introduced and acknowledged at all events and programs. Special program sponsorships and outreach opportunities are available to board members. *Customize this with benefits your arts group provides to board members.*

To gain a clear understanding of our Board responsibilities, we ask each Director for the following areas of personal commitment:

- We request that Directors attend our Board meetings, held six times each year, as well as events and special Board functions. Their presence is valued and active participation is important. *Customize to your groups # of board meetings etc)*
- It is expected that 100% of the Board contribute annually. Direct financial support allows our organization to maximize and leverage our mission and tells other funders that our Board of Directors is committed as investors. The minimum annual contribution is \$1,000. This may be in the form of corporate donation, individual membership or in-kind services and donations. **Your associate's financial expertise would be an important in-kind donation to our group and would cover their donation.** *Customize to your board member requirements*
- We request that each Director actively serve on one or more committees and be actively involved in our two fundraising events each year. *Customize to your board member requirements*

The quality of our services to the community is dependent upon a committed and involved Board of Directors. We would welcome the opportunity to take you or one of your selected associates to lunch to give them more information about Arts Inc. We have a performance next Saturday at the Colony Theatre and would love to have you or one of your associates and a guest join us. Some information about our organization is attached. We look forward to connecting with you and your company on a mutually beneficial partnership. I will call you this week to follow up.

Sincerely,

Mary Doe  
Chair, Board of Directors



[www,ArtsBoardMatch.org](http://www.ArtsBoardMatch.org) is your new tool for board recruitment. Beyond our website here are other suggestions.

**Recruiting new board members requires time, attention and consistent effort.**

When beginning your recruitment efforts you need to do your homework. Do the Board Self Assessment to measure your current boards effectiveness. Do the Board Skills Assessment to determine what areas of your board you need to strengthen. Strategically determine your board needs and develop a plan to recruit board members to meet these needs.

**Suggested resources for recruiting new board members**

*We have included space under each to write your ideas*

Current subscribers or patrons

Personal and business contacts of current board members

Suggestions from Executive Director and staff

Professionals in target companies

Small business owners

Professional Firms such as law firms, accounting firms, etc.

Consultants

Local Chambers

Business professional organizations

Trade Associations

Social Clubs

Civic Groups

Government agencies

Religious community

Schools and educational community

## RECRUITMENT SALES PACKAGE

### *History and background*

What is the mission of the organization? Why do you exist? Who do you serve?

### *What do you offer – package the offer*

Marketing materials

Event overview and photos

Performance calendar

Event calendar

Newspaper reviews and articles

Overview of your artists and product

Your impact on the community

### *What time commitment is required?*

How often does the board meet? What about committee assignments and or fund raising events?

### *Financial information*

Public budget

How is the organization funded? What are top funders.

Does the board discuss and approve the budget annually? Are financial reports reviewed at each meeting? Are they understandable?

### *Who is currently on the board*

Board list with company information

### *Why did you select this person as a potential member?*

Strategic plan to recruit new members and why they would be a good candidate

### *What are board requirements – recruitment overview can be one page which includes:*

Are board members expected to make an annual financial contribution?

What about tickets to performances, events and galas?

What expertise, skills do you want them to bring to the board?

How are new directors chosen?

What are the lengths of board terms? Are there term limits?

Is there an orientation and on-going training program for all board members?

These questions will help you evaluate the candidates interest in serving.

Are you supportive of the organization's mission?

Do you have the time and commitment level to be an effective board member?

Is this this group you would be proud to join?



## CUSTOMIZING YOUR BOARD EXPERIENCE

### Board Member Self-Assessment

Please complete and return by email to [arts-business-miami@att.net](mailto:arts-business-miami@att.net)

Name:

Phone:

1. Why did you join this board?
2. What types of tangible or intangible benefits were you seeking for as part of your board service? (up to 3 top benefits)
  - ☐ Professional networking
  - ☐ Social networking
  - ☐ Business development
  - ☐ Visibility in community
  - ☐ Opportunity to build new skills
  - ☐ Ability to be with and/or support my friend(s)
  - ☐ Opportunity to advance the arts in our community
  - ☐ Opportunity to support the community
  - ☐ Other \_\_\_\_\_
3. What types of tangible or intangible benefits have you received since joining the board? (up to 3)
  - ☐ Professional networking
  - ☐ Social networking
  - ☐ Business development
  - ☐ Visibility in community
  - ☐ Opportunity to build new skills
  - ☐ Ability to be with and/or support my friend(s)
  - ☐ Opportunity to advance the art form in this community
  - ☐ Opportunity to support the community Other \_\_\_\_\_
4. Recognizing that one organization can probably focus on 2 or 3 benefits, what 2 or 3 tangible or intangible benefits do you think the organization could offer and/or improve on?
5. What types of support tangible or intangible do you feel you've offered the organization as a Board member to date?
  - ☐ Contributed to organizations visibility and/or public relations efforts
  - ☐ Increased audience and/or membership
  - ☐ Introduced new donors or funding partners
  - ☐ Provided financial or programmatic oversight
  - ☐ Contributed to the visioning, strategic planning and overall organizational development
  - ☐ Contributed to board recruitment and development
  - ☐ Provided in-kind skills and services to fulfill the organizations mission
  - ☐ Attended and brought people to events and programs
  - ☐ Been an advocate for the organization in my company
  - ☐ Spread the word about the organization to my colleagues, clients and friends
  - ☐ Other \_\_\_\_\_

Please return by email to [arts-business-miami@att.net](mailto:arts-business-miami@att.net)

Thank you!