



Post Board or Leadership Volunteer Committee Service Recognition and Engagement Plan.edu©

We are grateful for the service of all our leadership volunteers. Their expertise, time, wisdom, and active participation helped make the institution stronger and more effective. As volunteers reach the end of their terms, or as we need to ease off volunteers for a variety of reasons, we want to keep them as ambassadors, advisors, and active going forward. The engagement opportunities must be productive for the institution, satisfying and meaningful for the individuals. A former trustee engagement plan must also align with the vision, strategic goals, and plans of the institution.

Ideally, the institution has high performing boards and/or leadership committees. All volunteers are invested deeply in the institution's success. Your institution is first, second, or third among the volunteer's philanthropic priorities. Every volunteer helps you achieve your goals by freely giving time, wisdom, and generous philanthropic contributions. They share their connections within the business, government, and foundation communities. To the extent that this is not true, it is important to work simultaneously on a strong board or committee development plan. To the extent that it is true, you want to hold onto every high-performing volunteer as he or she concludes service.

Individuals' lives and priorities change. We must recognize sometimes highly dedicated and engaged trustees may not be able or willing to maintain the same level of commitment once he or she steps down. Your approach and plan must also accommodate this potentiality.

Some volunteers, however, have not served the institution well. Perhaps they are not philanthropic, or your institution is not important enough and is therefore not a priority. The plan needs to be flexible enough to serve those we are easing off key committees and/or boards.

Consider a Three-tiered Approach

Chairs Circle

Chairs are usually the most knowledgeable, most invested, most generous. They probably gave a tremendous amount of time above and beyond what is required. They are often successful people in their private lives. We want to continue to tap into their passion, connections, and expertise. Therefore, consider having all former chairs automatically become a member of a special Chairs Circle unless he or she prefers not to serve. Invite all members of the Chair's Circle to attend all board and/or committee meetings as ex-officio members. Based on interests, and expertise, members of the Chairs Circle can serve on standing and/or ad hoc committees as non-voting members. Each member receives a full briefing prior to the meetings, ideally by a current trustee "buddy." Chair of the board and/or committee invites each to participate actively in discussions at meetings. Send each monthly or quarterly updates from either the CEO or current board or committee chair.

As expected of all volunteers, we expect members of Chairs Circle to continue to make the institution a top philanthropic and volunteer priority (just not as much work). Engage members as individual contributors in ways each member finds meaningful and the institution finds productive. Members of the Chairs Circle, like all trustees and volunteer leaders, are personally solicited for annual stretch gifts

and, during campaigns, for gifts over and above his or her annual gift. Ideally, a peer is part of the solicitation team.

Presidents (Heads) Circle or Board Fellows

By invitation and through one-on-one discussions, some former trustees are asked to join the Presidents (Heads) Circle. This select group of individuals each has a defined engagement with the institution based on interests, expertise, and the needs of institution. Each member receives monthly or quarterly updates from either the Head or current board or committee chair and we seek his or her advice and counsel.

Each member has a staff liaison. Together the member and staff liaison shapes a personalized engagement plan. This could include service on board committees as non-voting members, service on other special committees and/or task forces, providing advice and counsel to the CEO on key issues, helping with fundraising and donor engagement and stewardship or any number of personalized engagement opportunities.

As expected of all high-level volunteers, you will ask members of Presidents Circle to continue to make the institution a top philanthropic and volunteer priority. Members are personally solicited for annual stretch gifts and, during campaigns, for gifts over and above his or her annual gift.

Special Advisors

All former volunteers who are not members of the Chairs or Presidents Circles are recognized and honored for his or her service as a Special Advisor. Advisors receive regular briefings from the President/Head and/or Chair via email. Each has an opportunity to provide advice and counsel in response to the email. This is an ideal place for those who do not meet your criteria, you have eased off for various reasons, or did not renew.

It is your hope that all Advisors will continue to be generous annual donors to the institution and will actively participate in planned activities. The amount of time and attention given this group is minimal.

Management

The Development Office in conjunction with the President's Office (or other key senior staff) manages the three groups, ensuring timely notification and information sharing, engagement plans, and metrics. Current trustees and committee chairs play active roles in engaging these groups, keeping them informed, seeking counsel, soliciting and providing meaningful stewardship.

Do track the levels of engagement and personal satisfaction of members as well as contributions in terms of wisdom, participation, connections, giving, and helping engage and raise money from others. Make adjustments as needed.

If you would like to learn more about board transformation, building, or strengthening or any other aspect of volunteer management and/or fund development, contact us at 914 428 7777 or mail@theosbornegroup.com

Visit us at www.theosbornegroup.com for FREE podcasts, videos and webinars. Follow us on Twitter: @kareneosborne, @bobosborne17. Connect on LinkedIn: Karen Osborne, Robert Osborne, Jr. Yolanda Rahman, and Laurel McCombs.

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