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Past Presence

Former trustees who serve on emeritus boards can offer a historical perspective to current members

By Kimberlee Roth

When trustees retire from the board of Thurber House, a nonprofit literary center in Columbus, Ohio, many find that their work is just beginning.

Since the early 1990s, former board members of Thurber House, which provides programs for writers and fans of the humorist James Thurber, have gathered twice a year for lunch -- in a klatch playfully dubbed Board Infinitum.

Donn Vickers started the lunch group while he was Thurber House's executive director. Mr. Vickers, who now serves as executive director of the Academy for Leadership and Governance, also in Columbus, says that forming the group for emeritus board members seemed a given.

"What I'm always trying to do is continue to enlarge, broaden, and deepen the community of people who care about this place," he says. "If you get 15 trustees in, ship 15 out, and get another 15 in, you haven't really done that. Nonprofits need a small community of folks on an ongoing basis to participate in a variety of ways in the life of the organization."

Dispensing Wisdom

Mr. Vickers also founded a "presidents' group" while at Thurber House, composed of people who had served as president of the charity's board, to meet for lunch quarterly, and serve as a cabinet of sorts for the organization's leadership. "No one would miss the presidents' group -- it was just too juicy," he says.

The group still meets three times a year for an "in-depth discussion of issues, policies, strategies, and plans," says Susanne Jaffe, Thurber House's current executive director.

Board Infinitum members introduce authors at Thurber House events, serve on committees and as tour guides, and, once a year, meet with Ms. Jaffe for a brainstorming session.

The presidents' group has offered recommendations on many issues, such as how to get particular trustees more involved, how best to restructure some staff positions, and changing the format of board meetings.

Members "didn't have to prepare, and we didn't hand out a lot of papers," Mr. Vickers recalls of his time with the group. "I came with a set of real issues. They didn't make decisions; they didn't do policy; it was only wisdom they were all dispensing."

Ms. Jaffe says she finds the group's value "inestimable." In terms of "history, insight, knowledge, and guidance," she says, the members are "an extraordinarily rich resource."

It is important to keep former trustees engaged, says Lora Pollari-Welbes, director of member relations and services at the National Council of Nonprofit Associations, in Washington.

"You've spent time cultivating strong supporters of your organization and you want to build on that support and utilize that expertise," she says. And, she notes, former trustees are "often your best word-of-mouth advocates, speaking to others and getting others to be supporters."

Yet given the demands of running a nonprofit organization, chief executives and board chairmen don't always see departing trustees as the potentially valuable resource they are, says Patricia Lewis, senior practitioner in residence at the Center for Nonprofit Leadership and Management, at Arizona State University, in Tempe.

"Most nonprofits are small, and spending time and resources beyond making the current board effective is often more than many can take on," she says.

A Sense of History

Past trustees can bring a historical perspective to current boards, says Susan Schiffer Stautberg, a consultant in New York who specializes in establishing advisory councils for businesses and charities. Ms. Stautberg also serves as assistant secretary of the Preservation Society of Newport County, in Newport, R.I., a historic-preservation organization that created an "overseers group" in 1995.

Currently the group has 10 members. "We're very careful about not letting the group become a gathering ground for all of those whose terms come to an end," says Trudy Coxe, the Preservation Society's chief executive officer. "It really is a privilege granted to a small group of individuals who have had a longstanding relationship with the organization."

Overseers are welcome at board meetings as nonvoting visitors, and they participate in other events. Three years ago, overseers joined in a panel discussion of the history of the society for 250 of the group's employees. Ms. Coxe calls upon individual members when

she seeks a particular piece of information that she can't find by perusing the archives of previous board-meeting minutes.

"They give a sense of stability to the organization that as CEO I'm very grateful for," she says.

The historical perspective offered by emeritus trustees is proving invaluable to the strategic planning currently under way at Texas CASA, in Austin, a network of volunteer court-appointed special advocates for abused and neglected children, says Megan Ferland, the group's leader.

"One of the board's responsibilities is to define our primary client -- is it the child or the network of local CASA programs?" Ms. Ferland says. "Our emeritus board members were able to talk about when CASA was created 15 years ago, what the focus was, what the services were, and how that's changed and grown."

Fourteen former trustees, many of whom are co-founders or past board presidents, serve on Texas CASA's emeritus board. They were nominated by the charity's current board of directors and approved by a majority vote. Though welcome at board meetings, the emeritus trustees don't vote -- and, unlike the CASA's current board members, they are not subject to term limits.

Emeritus board members' responsibilities -- to serve as advocates, provide feedback to the board and staff members, provide advice and technical expertise, assist with recruiting other supporters and potential board members, and help with fund-raising efforts -- are spelled out in the organization's bylaws.

Providing Inspiration

Texas CASA's emeritus board members, says Ms. Ferland, have also performed another service: motivating the charity's current trustees. For example, she sums up the impact when a past board president recently attended a board meeting.

"There was a wonderful sense of history and reunion and commitment to the mission of CASA, to have this very influential individual care enough to come back," she says. "It made everybody feel good. It really helped enforce how important the work is that the organization and the board do."

Indeed, says Ms. Lewis of the Center for Nonprofit Leadership, that sense of renewed commitment to mission is one of the benefits of emeritus boards -- for both former and current trustees. "Organizations have to think about how it can be meaningful to both sides," she says.

She notes that AARP, the advocacy group in Washington that champions the elderly, invites former board members to its annual meeting. AARP, she says, even provides financial assistance to those who desire to attend but lack the money.

"They bring these people back and find a role for them, like introducing a workshop," Ms. Lewis says. "And they're invited to dinner where the CEO goes around and talks with them. They feel very included and that their service has been worthwhile. For this particular board, where members commit a lot of time, it's a nice transition for them."

For outgoing trustees, says Ms. Ferland, to go from "pretty intense commitment to an organization and cause they're passionate about to no involvement is like quitting cold turkey. The emeritus board gives them a way to maintain their connection and involvement at a less intense pace. At the same time, they trust we'll call upon them for specific projects, such as board recruitment."

'Another Chop at the Apple'

People who have left nonprofit boards and gotten involved in less formal ways say they appreciate the opportunity, even if they don't have as much power.

"I think they're glad to have another chop at the apple," says Joe Williams of former board members who continue to work toward a charity's mission.

Mr. Williams, of Spring Island, S.C., has been involved with the Nature Conservancy for two decades. Following a 10-year term on the environmental group's national board of directors, Mr. Williams worked to start the President's Conservation Council in 1998, which is intended to serve as a sounding board for the charity's leadership. The council, which comprises former and current trustees, meets three times a year.

"It takes a while to really understand how the Nature Conservancy works -- it's a complex organization, decentralized and working all over the world," he says. Trustees' terms, he notes, last a maximum of nine years. When board members end their stints and have no further association with the group, he says, "there's a lot of experience that is being lost and a lot of enthusiasm not being ignited, and considerable financial support that could be available."

An emeritus board, he says, benefits not only the charity but also the veteran trustees like himself. "What I get is the satisfaction of feeling like maybe we're making a difference," Mr. Williams says. "If we keep at it with increasing scale and velocity, we'll make a bigger difference."

Informal Involvement

Engaging recent board members need not always be a formal part of a group's bylaws, says Sam Thumma, immediate past board chair of the Grand Canyon Chapter of the American Red Cross, in Phoenix.

Mr. Thumma serves on the volunteer and employee leadership development committee of the charity's Western Service Area Resource Council, and has recently been looking at

the issue of keeping former board members involved in order to share ideas with other Red Cross chapters.

He suggests that nonprofit organizations reach out to their past board members in informal ways, such as inviting former trustees to serve on committees after their terms end, extending special invitations to events, and recognizing former board members at annual meetings.

But the best time to nurture that post-term connection, adds Mr. Thumma, is well before the trustee's term ends.

"It is and has to be an ongoing educational activity," he says. Trustees should be told regularly about volunteer opportunities beyond board service, he says. When board chairs meet with members one-on-one to discuss their current board participation, he says, "that's a perfect opportunity to raise these other issues."

Committees are another way to engage former trustees, says Ms. Pollari-Welbes, of the National Council of Nonprofit Associations. She suggests appointing them to advisory groups that can be charged with a specific task -- such as helping with a campaign, identifying new leaders, or advising staff and board members who are buying a new building.

The group's role may change as the organization faces new issues, and the charity's culture should determine whether members serve for a fixed period of time or as ongoing advisers.

Indeed, keeping past trustees involved is something that charities will tackle in a wide array of ways, says Mr. Vickers of the Academy for Leadership and Governance.

"The more creative and expressive you can be the better, the way I see it," he says. "You want governance to reflect the mission. If you have an artistic product like a dance theater, and then a governance system that looks like IBM, that makes no sense. Integrity is what you want."

CREATING AN EMERITUS BOARD

Here's a sample of how emeritus boards may be created in a charity's bylaws. The following is an excerpt from the bylaws of Texas CASA, a child-advocacy group in Austin, Tex.:

Section 3, Emeritus Board. Directors may establish a Texas CASA Emeritus Board to support the mission and programs of Texas CASA. Membership on the Texas CASA Emeritus Board is restricted to retired or past members of the Texas CASA Board of Directors or Texas CASA Corporate Advisory Board who have provided distinguished service to the organization over a sustained period of time. Any standing member of the

Texas CASA Board of Directors can nominate individuals for membership to the Emeritus Board.

Nominations must be approved by a majority vote of the standing members of the Texas CASA Board of Directors. Emeritus Board members are not voting members of the Board. At least annually, the Texas CASA Emeritus Board shall meet for an update on the operation of the Corporation. The responsibilities of Emeritus Board members are to:

- A. Serve as advocates for Texas CASA and its affiliate local CASA programs;
- B. Provide feedback to the Texas CASA Board of Directors and Texas CASA staff;
- C. Provide advice and technical expertise to the Texas CASA staff;
- D. Assist in targeting others whose interest and support are important to Texas CASA; and
- E. Assist and advise the Texas CASA Board of Directors in fund-raising efforts, where appropriate.