

2009 SOS Submission: Baton Rouge

The Presidents Council: Retaining Membership, Growing Engagement, and Utilizing Expertise of Past-Presidents

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Chapter Name: ASTD Baton Rouge
Chapter ID: CH7121
Chapter Location: Baton Rouge, Louisiana
Chapter Membership Size: Small (Less than 100)

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Description of Effort: The ASTDBR President's Council was established on Wednesday, January 17, 2007, to begin meaningful, ongoing consultation and strategy sessions for dual purposes: (1) to keep Past-Presidents involved in the Chapter as active members and (2) to utilize their knowledge and expertise of Chapter management and Chapter history in leadership roles to support the current President and Board. The Council began with the 2007 Chapter President, Immediate Past-President, and President-Elect. Starting with this core group, the President's Council grows annually, the Chapter benefits from their consultation with the President and from their completion of meaningful project accomplishments, and the Past-Presidents not only have retained their local memberships but have grown more active in volunteering for the Chapter.

Need Addressed: For a number of years prior to 2007, the ASTDBR Board had struggled to find ways to keep Past-Presidents involved in Chapter activities. On occasion, a Past-President would be asked to present at a membership meeting, which helped with their satisfaction and utilized their expertise; however, these one-time experiences had short-lived results. Immediate Past-Presidents would occasionally facilitate portions of Board retreats. One committee, consisting primarily but not exclusively Past-Presidents, was handed a project to tackle regarding review and revision of the Chapter Leadership Guide, an effort which soon disbanded and produced no meaningful group outcomes. Most Past-Presidents stopped attending meetings. Many dropped from the membership due to lack of interest, recognizing their skills were being underutilized, or feeling unappreciated. When the few remaining Past-Presidents who did actively attend meetings then left the Baton Rouge community or changed careers, the Chapter was left with only two Past-Presidents in the entire membership. Not only were we not addressing the needs of the Past-Presidents, we were losing the knowledge they could provide and therefore not best addressing the needs of the Chapter.

Does this effort align with your chapter mission? Yes

Does this effort align with ASTD's mission? Yes

Target Audience: Direct: Chapter Presidents and Past-Presidents. Indirect: Chapter Boards of Directors and Membership

Costs/Resource Use: No costs are associated with this initiative.

How did you implement: The first meeting of the President's Council was held on Wednesday, January 17, 2007 at a centrally-located coffee shop. It was convened by a core group of the three active Board "Presidents" – President, Immediate Past-President, and President-Elect – with an initial agenda designed

to support the President in transitioning into her new role and to outline the goals of the Council as reflected in these documents.

What were the Outcomes: The President's Council has grown from three members to seven members. The Past-Presidents have become more active in a number of ways, including but not limited to chairing the nominations committee, returning to the Board as an officer in another role, volunteering to work on program and professional development logistics, bylaws revision, guidance on financial investment/budget planning, risk assessment committee chair, and ensuring CORE criteria are monitored. The Past-Presidents' expertise help the Board best strategize and ensure past mistakes are not repeated. Prior to the President's Council, should a Board member or volunteer "drop the ball" in job performance or a Board position be unable to be filled, a President would have to fulfill the role personally or utilize the Board to seek out a volunteer to fulfill the role. With the establishment of the President's Council, Presidents and their Boards were able to tap into an additional resource of volunteers at hand who could step in to help on an interim or long-term basis. In addition, due to their many years of service, Past-Presidents know the members' abilities and interests quite well. They can be an asset in recommending and/or directly requesting the service of the members as volunteers. Because of the active involvement of Past-Presidents, satisfaction is increased among all parties – Past-Presidents, Boards and membership. The Chapter, therefore, moves forward more successfully and energetically. Past-Presidents are now more likely to renew local annual memberships, attend meetings, and volunteer.

Lessons Learned:

Projects assigned to Past-Presidents must be meaningful and long-term, not rote or one-time assignments.

A request to a Past-President to present an educational program to the membership or facilitate a portion of a board retreat does offer satisfaction to the Past-President at the time. Whereas this sharing of knowledge with the membership is mutually beneficial to the Past-President and the membership, year-round involvement (which may include but not be limited to these activities) ensures satisfaction and utilization of knowledge on a long-term basis.

We have discovered the President's Council to be an excellent resource to a current President for brainstorming, sharing knowledge, preserving history, deliberating pros and cons of proposals, mentoring, leadership development, advising on Board management, and participating in completion of major projects.

The membership appreciates the visibility and activity of Past-Presidents. By their clear passion for the Chapter, their commitment encourages the membership to volunteer and to consider Board service.

Clearly, receiving advice from a larger pool of experts allows for exploration of more options in setting strategy. Hearing "what hasn't worked" helps keep the chapter moving forward.

If Past-Presidents have been inactive for some time, it may be best to start with a core group of active Presidents; should they be satisfied with that year's successes, they will readily agree to serve on the President's Council for continued years. This proved effective for our Chapter. After the President's Council has shown success, stronger opportunities arise to reengage Past-Presidents from many years prior as they see their voluntarism will be meaningful and appreciated.

Allow Past-Presidents who live outside of the Chapter's geographical area to serve by participating via conference call or e-mail.

Each current President should know all the roles in which each member of the President's Council served on the Board prior to becoming President. For example, our Chapter's initial President's Council consisted of three members who had served in prior years as Treasurer and as Vice-Presidents of Programs, Marketing & Communications, Publications, and Membership. As the Council grew, additional expertise came to the table from Past-Presidents who had served as Vice-Presidents in the areas of Professional Development and Technology. This breadth of knowledge of Board functioning is a tremendous gift to a Board President.

Presidents and Past-Presidents should clearly understand from the initial meeting of the new calendar year that their role is as an advisory council and not a decision-making body. It should also be made clear at the initial meeting that each Past-President's opinion is of equal weight. "Egos are left at the door." Current Presidents should understand and express that their role as chapter leaders is to facilitate the actions of the Board. Presidents should ensure the Board understands that although the President's Council is an exceptional resource, the Board is the governing body and not a "rubber stamp." The President's Council is an advisory resource, the President a facilitator and leader, but the active Board is the ultimate strategic body and "the final word." We are fortunate that our President's Council established this reminder from its inception and our Boards are and have been comfortable with questioning pros and cons of any recommendations before making decisions. Reinforcing all deliberations, recommendations and decisions is the initially agreed-upon commitment that all of these actions will be made only in the best interests of the Chapter.

Make the membership aware of the President's Council and its role as a means to inspire members to volunteer in Chapter service.

Give the Immediate Past-President remaining on the Board of Directors an immediate meaningful assignment written in the Chapter Immediate Past-President job description. Therefore, upon election as President-Elect, in preparation for his/her three year term, the President-Elect will know and agree to this role in advance, will have an important and clearly-identified task to fulfill, and will automatically be engaged in continued activity.

Never assume your Past-Presidents don't wish to remain engaged.

With Board approval and ratification of membership, add the President's Council to the Chapter bylaws as a standing committee convened by the Chapter President. Therefore, its dissolution may only take place by ratification of the membership. Such importance placed on this committee's role impresses upon the membership the continued commitment of Past-Presidents to the Chapter.

Future ASTDBR President's Council roles in discussion may include expanding the membership/volunteer force by having each Past-President recruit a former Board member with whom he/she served to rejoin the Chapter membership and/or to expand the role of former Board members by requesting their return to volunteer service whether it be committee service or day-of-event logistics.

Specific ASTD chapter resources that helped guide you in the process of completing this best practice:
This form was submitted at: <http://www.astd.org/membership/ChapterLeadership/sosForm>

Attached: Growth of the ASTDBR President's Council from 2007 – 2010; President's Council Meeting Summary of New Business at Selected Meetings; and Examples of Individual Past-President Activities since the Conception of the President's Council