



# Volunteer Handbook

## Board of Trustees Responsibilities

### Responsibilities of all Trustees

- Serve in an advisory capacity, working closely with staff.
- Set the strategic direction for Institute by establishing and updating standard operating procedures and policies.
- Participate in Institute activities throughout the year through meetings and email communications.
  - Attend two board meetings per year – one in-person during the Fall Board Meeting and one virtually in February.
- Support the program by sending an executive from your organization and/or mentoring an executive from another organization.
- Champion DE&I efforts of increasing representation by proactively reaching out to national, local, and/or regional diversity representative organizations to build relationships and increase program awareness.
- Recruit new attendees by promoting Institute to circles of influence through various mediums, i.e. state conferences, social media, personal testimonials, etc.
- Support the program financially by donating directly to the scholarship fund through online fundraising efforts.
- Provide recommendations to Institute staff for program improvement in the areas of logistics, curriculum, and faculty.
- Facilitate year-round industry consultations, as appropriate.
- Take off “site hat” when acting on behalf of the trustees, recognizing the program on a national level.
- Attend any of the four Institute sites and engage in the following ways\*:
  - Lead a lunch roundtable discussion.
  - Facilitate at least one industry consultation on-site, following up post-site as appropriate.
  - Audit a class in area of expertise.
  - Attend Graduation, if possible.

*\*Trustees are strongly encouraged to participate and to choose a site they have not previously attended in an effort to gain better understanding of the overall program and build stronger relationships. This can also help in identifying a pipeline for future leadership roles.*

(continued)



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### Marketing and Recruitment (additional responsibilities)

- Distribute Institute collateral such as planners, flyers, and other materials to state and local conference attendees.
- Focus on first-year promotion and recruitment:
  - Reach out to organizations with which you have connections.
  - Identify areas of opportunity and help build prospect database:
    - Associations outside of the DMV area.
    - States with more limited attendance.
    - General nonprofits outside of chambers or associations.
    - Accredited chambers not recently attended.
  - Reach out to identified prospects and build ongoing relationship.
    - Share resources, such as the [All You Need to Know and IOM Content & Curriculum flyers](#), highlighting ways to engage off-site (webinars, podcast, blog, year-round industry consultations, etc.).
- Work closely with staff to share feedback, including barriers to entry.