

## *Step 6*

### *Successor Advisors*

## **Successor Advisory Board Members**

Seven to nine people should be identified as successor advisors and Community Fund education provided to them on a regular basis. Prospective members may be asked to serve on a committee, task force, or they may even receive meeting minutes.

This list of prospective Advisory Board Members should be part of an on-going effort to educate the community and provide orientation to ensure a smooth and timely transition of retiring board members.

An Advisory Board Member contact form follows.

***Successor Advisory Board Members***

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_

<b>Contact Name</b>	<b>Comments Over if Necessary</b>	<b>When Month</b>	<b>Type - Business - Individual</b>	<b>Who Should Contact</b>	<b>Phone Number</b>	<b>Contact Made/ Follow-up date</b>
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

April 9, 2003

«Name»

«Address1»

«CityStZip»

Dear «Salutation»,

Developing a strong sense of community and improving the quality of life are among the reasons that prompted area citizens to establish The \_\_\_\_\_ Fund in [DATE]. Independent of local government, a volunteer board encourages growth of the fund and oversees grants and distributions.

We currently have (two) positions open on the Advisory Board. The current board members feel strongly that the Fund should be directed by a group of people whose backgrounds are diverse enough to represent the needs of the community. You were highly recommended to fill one of the open positions.

As a component of the Community Foundation of Southern Wisconsin, the \_\_\_\_\_ Fund is able to enjoy a variety of services available to not-for-profit organizations. Traditionally, Community Foundations and Community Funds have assisted philanthropic giving in a community to ensure that there are charitable dollars available in a community forever.

We would like to meet with you to introduce you to the \_\_\_\_\_ Fund, the Community Foundation of Southern Wisconsin, and to offer you the opportunity to talk about the importance your role would have on continuing to make the \_\_\_\_\_ Fund a strong community resource. One of the Advisory Board members will be contacting you to set a time, at your convenience, to meet.

On behalf of the \_\_\_\_\_ Fund Advisory Board Members, I thank you for your consideration of this request.

Sincerely,

Jane Doe

\_\_\_\_\_ Fund Advisory Board Chair

January 29, 2007

<<Name>>  
<<Organization>>  
<<CityStZip>>

<<Salutation>>

On behalf of the Community Foundation of Southern Wisconsin and the \_\_\_\_\_ Fund, we want to take this opportunity to thank you for serving as a volunteer Advisory Board Member.

While we are proud of the achievements we've made over the past \_\_\_\_\_ months, there is much yet to be accomplished. We hope that you will continue to share the importance of this philanthropic resource with members of the community and remember to keep the \_\_\_\_\_ Fund a part of your own philanthropy-For good. For ever.

Best wishes,

Jane Doe

\_\_\_\_\_ Fund Chair