Effective Volunteer Leadership Training

May 6, 2018
Agenda

Breakout Sessions:
• Roles, Responsibilities and Authorities: Executive Board, Staff, and Departments/Districts/Divisions
• Building Successful Staff/Volunteer Relationships
• Addressing Conflicts and Making Tough Decisions
• Energizing and Engaging your Volunteers
• Becoming Effective Volunteer Leaders

Group Session:
• Q&A
• Key Takeaways
Roles and Responsibilities
Understanding Governance

Governance versus Operations
Governance versus Management
Board versus Staff

- The primary role of the Board is to ensure the success of the organization by deciding the best thing to do.

- The staff’s primary role is to decide how to do it best (execute, etc.).

Board Decisions = Binding

Board sets the strategic direction (Ends) and budget (limitations)

Board delegates authority to Executive Director

Executive Director authorized to identify the “means”

Executive Director oversees staff, vendors and resources

Individual Directors = Not Binding
Executive Board GOVERNS and staff MANAGES.

The authority derived from the Articles of Incorporation (state law) and Bylaws.

A Board generally fulfills four functions.

A Board empowers its staff.

Governance
Policy & Position
Development
Vision
Fiduciary
Important Role of Districts, Divisions, Departments and Section Leaders

District, Divisions, Departments and Section Leaders – The entities are an essential part of achieving results for organizations.

Ideal Purposes:
1) Supplementing the work and resources of the board and staff to achieve the strategic plan;
2) Engaging stakeholders/members;
3) Identifying and developing leaders.
Role of the Executive Director

- Executer, manager, decision maker and leader responsible for the day-to-day management of the organization and implementation of the organization’s strategic plan and board decisions.
Staff/Volunteer Relationships
Muffin Management versus Strategic Management
Defining Roles/Setting Expectations

- Develop written job descriptions
  - Board
  - Staff
  - Vice Presidents
  - Section Leaders
- Construct a matrix chart (RACI)
- Set expectations
- Set clear objectives and goals
- Monitor progress and evaluate performance
Set Guidelines & Processes

• Set policy
  • Guidelines for Board/VP/Staff interactions
  • Establish a formal process for staff grievances
Addressing Conflicts and Tough Decisions
The Top Dysfunctions of Volunteer Groups (Boards, Departments, Districts, Divisions)

- Getting into the weeds
- Working in the background vs. in the spotlight
- Little teamwork and too many agendas
- Difficult leaders
- Infighting and personality issues
- Destructive criticism
- Flawed decision making
- Inability to set or focus on goals
Cure for Dysfunction

Great Leaders
- 50,000 foot level
- Empower staff and volunteers
- Regular assessments
- Training
- Accountability

Great Staff/Volunteers
- Environment of success
- Updates and progress
- Scope of work tied to plan
- Training

Great Direction
- Strategic plan in place
- Teamwork and cooperation
- Resource allocation (human and dollars)
- Succession planning
- Strong volunteer and staff team
- Strong business plan to execute strategies
Making Tough Decisions

• Keep the mission and strategic goals at the forefront
• Be open and receptive to hearing all viewpoints
• Make an informed decision
• Wear your ISA “hat”
• Support the group decision once the vote is final
• Recognize when there is a conflict of interest
Questions to Ask

• What will happen if we do or do not make this decision?
• Is this truly a department/district/division decision; or is this a Board level decision?
• What will the impact be?
• Is this discussion in line with the Society’s strategic goals and direction provided by the Board?
• What is the best venue for making this decision?
• Who should be included in the information/data gathering process? When to include staff? When to include/inform the Board?
Energizing and Engaging Volunteers
80% of nonprofit organizations rely on volunteers for their existence.
Importance of Orientation and Training

• Imagine being hired for a job….  
• Yet you have none of the necessary skills  
• No past experience  
• Yet, you have all of the responsibilities and risk associated with it

Unfortunately this is how many organizations treat their volunteers!
Happy Volunteer?
Engaging Members as Volunteers

• Clear direction/charge
• Task Forces
• Strategic committee work
• Buddies
• Annual orientations
• Short/focused opportunities
• Set expectations
• Committee Descriptions/Charters
Effective Volunteer Leaders
Setting the Stage for Collaboration

• Set Expectations
  – Define roles
  – Offer orientation and training (Fiduciary Role)
  – Communicate expectations PRIOR to Board service

• Establish Structure
  – Set ground rules
  – Develop and adhere to policies

• Establish Culture of Participation
  – Encourage idea sharing/open communication
  – Allow time for networking and fun

• Provide Opportunities for Self-Reflection*
Wrap Up

• Q&A during 4:30 Group Session
Key Takeaways

• What did you learn?
• What questions do you have?
• What do you want to learn more about?
• Questions?