



*Everyone Ready*®

Achieve more when *everyone's*  
ready for volunteers

FROM ENERGIZE

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## Slide Views for Notes

### **Building and Sustaining Strong Volunteer Leadership**

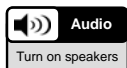
*Trainer: Carol Weisman*



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An online volunteer management  
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## Building and Sustaining Strong Volunteer Leadership

Online Seminar – Part 1 of 3

With Carol Weisman

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## Building and Sustaining Strong Volunteer Leadership



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### Carol Weisman

- President of *Board Builders*
- Trainer, speaker, consultant
- Author:



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## What We'll Cover

### Part 1

- ☐ What does "leader" mean?
- ☐ Leadership styles
- ☐ Challenges in finding volunteer leaders today

### Part 2

- ☐ Why people say "no" – and "yes" – to becoming a leader
- ☐ Finding new leaders

### Part 3

- ☐ Helping leaders succeed

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## Why Do We Need Leaders?

### Leadership roles in volunteer organizations:

- Board and advisory council members
- Event coordinators
- Committee chairs
- Special project managers
- Team/shift leaders



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## Which One Is a Leader?



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## Visionary Leaders

### Upside:

- Bold and innovative
- Creative thinkers
- Not afraid to dream big

### Downside:

- May want to move too fast
- May neglect the infrastructure



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## Servant Leaders

### Upside:

- Builders
- Bring dreams to reality
- Detail oriented

### Downside:

- May overdo the detail-checking
- Always have one more question



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## Which Type of Leader Do You Need?

### Match the leader to the task:

- Visionary leader
- Servant leader



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## Having Trouble Finding Leaders?

**Volunteer leader  
positions are harder  
to fill**

### Why?

- More nonprofits means more competition
- Consider:
  - 1.3 million vacant board positions in U.S. alone!

— Source: Booz Allen



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## Women's Roles Have Changed

**Societal changes affect  
women's availability:**

- Women have more options for paid work
- Everyone is juggling more professional and family obligations

### Result:

- The best and the brightest are less available



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## Men's Roles Have Changed, Too

**Men's availability is  
more limited these days:**

- Less support staff
- More family obligations
- Public and private demands on time



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## Changing Picture of Retirees

**Today's retirees are less available for volunteer positions:**

- More time on travel or personal activities
- Less likely to be in one place throughout the year
- May be caring for grandchildren or elderly parents



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## Effect of Economic Downturn

**How will the economy affect volunteer recruiting?**

- It's anyone's guess!
- Job seekers have time and need contacts
- But taking new jobs may cut into volunteer hours



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## Volunteer Couture

**Maybe you don't need epaulettes...**

**But consider ways to:**

- Help volunteers feel they belong
- Make it easy to pick out volunteer leaders



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## Achieving Leadership Diversity

### What is diversity, for your group?

- Geography
- Ethnicity
- Age
- Experience
- Religion
- Service users or non-users
- Or something else?

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## Diversity Question

**No matter what the situation, you must always seek a diverse group of volunteer leaders**

- ☐ True, diversity is always crucial.
- ☐ Not so fast. There may be exceptions.

Click on the best answer

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## Diversity Answer

**Do you need diversity? It depends...**

☒ No

☒ Yes



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## Key Concept



*Diversity doesn't make  
decision-making easier;  
it makes for better decisions.*

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- ☐ Why people say "no" – and "yes" – to becoming a leader
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### Part 3

- ☐ Helping leaders succeed

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**End of Part 1**

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**Why Do People Say "No"?**



**Why do people turn down volunteer leadership positions?**

- Don't want to supervise
- Just want to be a "worker bee"



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## Why Do People Say "No"?

### Could be a misperception about:

- Time required
- Work required
- Length of commitment



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## Plan for a "Yes" in the Future

### Plan for volunteer life cycles:

- Where are they today?
- What is their life plan?
- When will they be ready to lead?



Always have a Plan B!

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## Another Reason for "No"

### Sometimes, "no" means they disagree with your organization's direction

#### Bottom line

- Find out why people say "no" in order to get to "yes"

#### Assess your situation

- Need a good listener
- Something of an "outsider"



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## Getting to "Yes"

### Understand motivation for taking on leadership positions

- Handout: "Why People Volunteer"
- No pay doesn't mean no pay-off!

Be ready to state your offer – including the "why"



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## Where to Find Leaders

### Start:

- Within your organization
- With people who already believe in your cause
  - Current volunteers
  - Donors



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## Common Dilemma

### Many organizations have a large list of members but:

- A small list of "regulars" who participate
- Few or none who are willing to lead
- Why?



Sometimes, people get out of the habit!

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## From “No-Shows” to Leaders

### How do you get people re-involved?

- Get your “regulars” to call!
- People drop out for many reasons
- Invite them back personally
- A “we miss you” call may motivate them to try again
- Opportunity to reconnect as a volunteer – maybe as a leader



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## Don't Forget the Donors!

### Does your organization search in the donor pool for leaders?

- Fundraising is more than asking for money
- Thanking them for giving is just as important
- Call to thank donors for their ongoing support
- Ask **why** they contribute
- Train callers to discuss what matters to the donor and offer specific ways to volunteer, including leadership



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## Who Is the Common Thread?

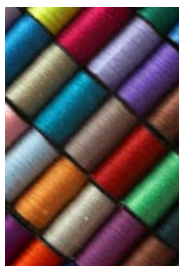
### How did current leaders get involved?

#### Common threads – the F.O.B.s:

- Friends of Barbara
- Friends of Bill
- Friends of Bob

#### Engage your “common threads”

- Involve them in recruiting
- Praise, reinforce and honor their activity



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## Is This a Good Practice?

**To recruit new group leaders, some agencies tell loyal volunteers:**

*"Each of you needs to bring in at least one of your friends"*



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## Checkers vs. Chess

**Common recruiting mistake:**

- Asking everyone to bring in one person as if they are all the same



**What's wrong?**

- The people you get may not fit your specific need
- Think chess, not checkers!
- Play to people's skills!

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## The Leaders Under Your Nose

**Consider frontline volunteers for a leadership role**

- Don't typecast
- Offer increased responsibility
- Don't insist
  - Only if they want to move to leadership
- Train group facilitators to recognize talent and interest



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## Attract New Candidates

- Search publications targeted to the skill set you are seeking
- "Google" for the type of person you want
- When you find a good lead, call, introduce your organization, and explain why you think the person might be right for your cause



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## Finding Young Leaders

- Ask alumni or school officials
- Use social networking to determine interests and location
  - MySpace
  - Facebook
- Post notices in places appropriate to the people you want to find
- Be specific about what you need



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## Easiest of All!

### Start with someone you already know

- Don't be afraid to ask
- Show why their talents fit well
- Recognize their past accomplishments
- Lead with their skills, not your needs



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## A Little Encouragement....

**Encourage those who are ready to lead, but don't know it**

- Are we using you effectively?
- Is there something you'd like to be asked to do?



### Common issues:

- Lack of confidence
- Hidden skills

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- ☒ Why people say "no" – and "yes" – to becoming a leader
- ☒ Finding new leaders

### Part 3

- ☐ Helping leaders succeed

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**End of Part 2**

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**Establish Expectations**



**Be clear about what the job involves**

- Duties
- Timeframe



**Be open to negotiation**

- But don't compromise on being able to achieve your goals

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## Clearly Define Success

### Establish:

- What support systems are available
  - Especially if these might change from year to year
- What training is available
- Include paid staff and key volunteers in setting expectations



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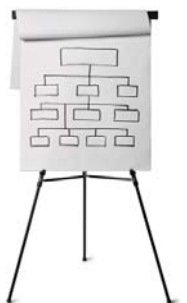
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## Define Boundaries

### Define boundaries of the leader's role

- Who's in charge
- Lines of authority
- Staff-volunteer boundaries can be hard to create or enforce



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## Put Agreements in Writing

### Put agreements with leadership volunteers in writing

- Sample in your handout packet
- Include major responsibilities and minor sticking points

**Sample Board Commitment Letter**

This document can be applied to agreements on other leadership responsibilities, too.

Date: \_\_\_\_\_

Please also use much for agreeing to serve on the board of \_\_\_\_\_

As the year goes by, our mission is \_\_\_\_\_

Our vision of the future of our agency is \_\_\_\_\_

We expect the following of our board members:

- Attendance at meetings: Our meetings are held \_\_\_\_\_ (list times, days and places) and our policy on attendance is \_\_\_\_\_ (list to be or if one cannot attend and how many a member can miss).
- The length of your term is \_\_\_\_\_ We anticipate that it will take you approximately \_\_\_\_\_ (hours, days, weeks or years) to complete your term on the board.
- Committee service: All board members are asked to serve on at least one committee. We are currently seeking you to be on the \_\_\_\_\_ committee.
- Financial contributions: We have the following financial expectations of our members: \_\_\_\_\_ We have that you will consider including our organization in your will, as many of us have.
- Participation in the following events: List special events, conferences, etc. and the level of participation expected. i.e., bring a business to the golf tournament, host a table to the dinner event, \_\_\_\_\_

In return, we will provide you with:

- Information and ongoing skill development
- Directors and officers insurance
- A board member (or sponsor), there is \_\_\_\_\_ (include phone number and a contact address) to help you from day one.

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## Commitment Letters



### For board or other key positions:

- Two copies (one for board records, one for new member):
  - Your mission and vision statements
  - Time and date of the meetings
  - Attendance policy
  - Financial and participation expectations
  - A warm welcome!
  - And much more

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## What Do You Do?



Your *long-time*  
board members no  
longer make the  
necessary  
commitments



- So how can you ask  
*new* leaders to sign  
a commitment letter?

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## Whack'em and Plaque'em



### Assess:

- What leaders do you need  
in place today to reach the  
future you want?
- Deal with those unwilling to  
change
- Find ways to redirect former  
leaders while welcoming  
new ones



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## Clarifying Board Expectations

### Process:

- Nominating committee drafts a board commitment letter
- Discuss with entire board
  - Clarify issues and negotiate roles



### Be honest about the time needed

- Availability varies with each person
- Do not assume!

### Once ratified, put it on your Web site

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## Training Options for Leaders

- At minimum, provide orientation:
  - Organization's needs, history, procedures
- Tell them what additional training is available
- Ask:
  - What do you need to learn to do this role well?
  - How do you like to learn?
  - Have you done similar work in the past? What are similarities and differences?
- Where they can go to get whatever further help or information they need

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## Development Opportunities

### Which opportunities can you make available?

- National online forums
- National conferences
  - Present as useful to them
  - Clarify who pays
- In-house libraries
- Resource portals:
  - [www.energizeinc.com](http://www.energizeinc.com)
  - [www.boardsource.org](http://www.boardsource.org)



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## Chances to Share or Obtain Ideas

### Encourage leaders to publish or present their work:

- Board/staff partners leading innovative programs make excellent co-authors
- Field wants to know:
  - What were the benefits of the program
  - Where were the landmines buried
  - Side-benefit: Spreads the word about your programs and recruiting needs
- Consider cross-training and scholarships



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## What Do You Think?

### Your project is difficult

You have found someone you *really* want in the leadership position

If you tell the prospective leader about the obstacles, the answer may be "no"

**What should you do?**



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## The Awful Truth

### Be honest about:

- Where your program is today
- What goal or outcome you are looking for
- What challenges you face
- Then ask:



**Is this something that would interest you?**

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## Principles

### Good volunteer management principles apply to leaders, too

- Recognition and thanks
- Listen hard
- Vary assignments
- Reassess periodically:
  - Is this what the volunteer expected?
  - Is the organization getting what it needs?



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## A Perfect Match

### Organizations often need leaders

### Individuals often have a need to lead

- Some know exactly what they are looking for
- If they find it, they will be great volunteers



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## Another Example

### How would you respond to:

- An available, highly-skilled, and interested potential leader
- With some real limitations
- Who needs flexibility, but can explain what she needs



Her inability to find a volunteer role is not unique!

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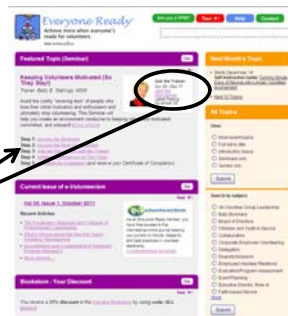
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## Discussion Board

### Join the Discussion!

Carol will be on the  
board January 16<sup>th</sup>  
through February 18<sup>th</sup>

Discussion Board



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