

EFFECTIVE PRACTICES AND IDEAS COLLECTION (EPIC)

Unit 2 – Working with the Board and Volunteers

Chapter 1 – Recruitment and Nomination

“It is impossible to imagine the universe run by a wise, just and omnipotent God, but it is quite easy to imagine it run by a board of gods.”

- *H. L. Mencken*

Identifying and recruiting new board members is a critical function of any community foundation. They may not be gods, but board members will lead and define your small universe for many years to come – so it’s important to secure highly credible people who are critical thinkers, who have good business sense and who support your mission wholeheartedly. It’s also important that they represent the constituent groups you serve and bring to the table the skills you need to move the foundation forward. And while they may fall short of omnipotence, ensuring that your board recruits are wise and just will not only further your foundation’s mission, but it will also make the CEO’s life a lot easier too.

Assessment

Take this quiz to determine your community foundation’s level of effectiveness in this area:

1. The board identifies leadership needs and priorities relative to the mission statement.
2. The board identifies desirable skill sets and characteristics needed to meet the identified needs.
3. There is an approved list of responsibilities and expectations for board members.
4. There is an on-going and well-managed process for identifying and engaging a wide range of qualified individuals.
5. Prospective candidates are familiar with the work of the foundation through participation as volunteers and donors.
6. There is a process for engaging prospective candidates in the work of the foundation before recruitment.
7. There is a logical process and timeline for approaching identified candidates that involves both board and staff.

8. For appointed boards: The appointing bodies are familiar with the work of the foundation and its leadership needs.
9. The community foundation includes factors relating to diversity, equity and inclusion as it seeks new board members and volunteers.

Stories

Here are stories illustrating this topic from other community foundation leaders:

At the Mercy of Others

When one small community foundation was originally organized, its board of directors decided that, in order to ensure that the entire county was involved and represented on the foundation's board of directors, they would ask each township trustee to make an appointment. This way, they felt that they could ensure geographic diversity.

Although well intentioned, this process did not work as well as they had hoped. In the early years, the township trustees treated this responsibility as one more thing to mark off their "To Do" list. Appointments were late and in one instance, the appointee to the foundation's board of directors had absolutely no desire to serve on the board of directors. She was just doing the township trustee a favor! As a matter of fact, she was so disengaged with the foundation that she refused to make any monetary contributions. The township trustee made contributions in her name.

As the foundation grew, appointment to the foundation board of directors became more prestigious. Now township trustee appointments became political. People were appointed to the board of directors as political favors – not the best scenario for a community foundation.

The board of directors changed the by-laws to prevent these situations. Although this foundation still has external appointments, the appointments are now made by the three school corporation boards from a short list of candidates provided to them by the foundation. This list of candidates has been developed by the nominating committee. All individuals submitted to the school boards have been interviewed and understand their role and responsibility. This resulted in an active, engaged board of directors.

What I Learned: Maintain control over your nominating process. This is an essential form of quality control for your mission.

The (Imagined) Rewards of Service

As higher education becomes more expensive, parents are naturally trying to find ways to finance the costs of college for their children. One of my board members thought she had a solution.

This woman was a well-known leader in the community. She called me one day asking about the possibility of serving on our board of directors. We try to have board members serve on a

standing committee before joining the board, but because of this person's high visibility our nominating committee chose to skip that process.

Soon after being appointed by the board – and before she had even attended our orientation session – the woman called to ask how her daughter could apply for a particular scholarship we administered. I explained that, under our conflict-of-interest policies, children of board members were ineligible for scholarships that we administer. “Are you kidding me?!?!?,” was the angry response, and the conversation soon ended.

A few days later, I received a letter from the woman, resigning from the board – before she had ever attended her first board meeting.

What I Learned: People who are overly eager to join your board may have hidden motives for wanting to serve. Before nominating or electing any person to your board, make sure they understand the expectations, and limitations, of board members.

What I Wish I Knew

- The appointing board only nominates from a short list approved by the foundation's nominating committee.
- You can save yourself some headaches by sharing the list of expectations and responsibilities with prospective members BEFORE you ask them to consider service.
- Recruiting strong board members is one of those activities that is highly important, but does not always feel urgent, making it easy to neglect in favor of more pressing matters. No matter what else is going on, make board recruitment a top priority, because there are few things more critical to your foundation's long-term success – and to the executive director's sanity – as good board members.

Red Flags to Watch Out For

- *People who beg to be on your board.* Screen such people carefully. Often, they have hidden agendas or represent narrow interests.
- *False assurances from current board members.* Sometimes a current board or nominating committee member tends to undermine expectations to board candidates – for example, telling a candidate that “we don't really expect every board member to help with development” or, “we understand that you are away on business often and may miss a lot of meetings – we could make an exception to our attendance policy for you.” If this happens to you, find ways to respectfully correct the misinformation, and either work to reform the wayward board member, or diplomatically change their committee assignment.
- *Board candidates who do not play well with others.* If there is ever a time for an executive director to pull rank and put her foot down, it is on the impending nomination or appointment of a board candidate who promises to cause pain and suffering to others in your organization. Strong personalities can be fine; people who offer

alternative viewpoints and can disagree respectfully with others are a great asset; but anyone who has a reputation for pushing their own agendas and behaving disrespectfully should be carefully screened. It's much easier to head such a problem off at the pass – even it means standing up to the candidate's friend on the board – than to deal with a problem board member for years to come.

Practical Tips

- Use a matrix to correlate characteristics, skills, and interests with prospective board members. When applied to current board members, this can be a useful self-assessment tool to identify areas of strength or weakness.
- Have a small group of current members interview candidates (informally) to assure a “good fit.”
- Document all critical contacts with candidates.
- Disqualification policies should be part of the vetting process.

Orientation

Getting to know you, Getting to know all about you.

Getting to like you, Getting to hope you like me.

- Oscar Hammerstein - (song lyrics from *The King and I*)

Throwing a new board member into the mix without any preparation would be unfair, frustrating, and unproductive. It's important to give your new members good information about your organization to help them become engaged quickly; to help them feel welcome; and to help them set accurate expectations. With a sound process for getting to know each other, you'll find your new board members feeling bright and breezy about their new role in no time.

Assessment

Take this quiz to determine your community foundation's level of effectiveness in this area:

1. There is an intentional effort made to help new board members understand the work of the foundation.
2. New members attend an orientation meeting before their first board meeting.
3. New members are informed of the legal and fiduciary responsibilities of board service.
4. New members are informed of the foundation's current financial situation.
5. New members are informed of current issues before the board.
6. New members are informed of how the foundation is structured and staffed.
7. New members are given a sense of the foundation's history, including its culture, stories, and values.
8. New members are encouraged to ask questions.
9. New members are proactively welcomed and mentored as they come on to the board.

Stories

Here are stories illustrating this topic from other community foundation leaders:

Permission to Feel Overwhelmed

Even with the best orientation, new board members still feel anxious from time to time. I always tell my new board members to expect to feel anxious, overwhelmed and inadequate at around nine months into their board service, give or take a month or two. This rule of thumb holds true often. In order to alleviate this anxiety, I always schedule a meeting with the new board members just to check in and find out how they are feeling. On one such instance, only a few minutes into the meeting, a new board member burst into tears and exclaimed, "I know you said I would feel like this and you were right! I just don't think I have what it takes to be a good board member. I think I should resign."

After calming the board member down, I said, “I see how caring and passionate you are about the foundation and your role as a board member. I truly believe that you will become one of our best board members, if you just hang in there. You have all that you need to be a great board member.”

In the end, the board member did stay on, and true to my prediction, she did become one of the best board members. However, had I not scheduled the meeting, it is very likely the board member would have resigned.

What I Learned: Keep in close contact with new board members and express your support and confidence in them.

What I Wish I Knew

- Orientation is a process, not an event. Whether formally or informally, education of board members will continue throughout their terms of service. You can use the initial orientation to set the expectation that board service will include ongoing support and learning.
- Board members learn the most from other community foundation board members, such as at state or regional gatherings.

Red Flags to Watch Out For

- *Lots of acronyms.* Do your best to avoid acronyms and jargon – or at least introduce and explain them, so your new folks start to feel “in the know.”
- *Information overload.* It can be a fine line between giving board members enough information and overwhelming them. Involving other board members in delivering orientation can help deliver just the right level of information to new people. Be sure to read your new board members’ nonverbal signs too and adapt accordingly. Different people have different thresholds for how much information they want and can absorb.

Practical Tips

- Have mentors and seasoned board members participate in new board member orientation meetings. Ask other foundation executive directors to participate, too.
- Orient new members before they join the board; develop and train after.
- Consider a retreat setting for new board member orientation meetings.
- Give context. Explain why the stuff you’re talking about is important.
- Help make your content more memorable by using stories and humor.

- Develop handbooks for your board members that contain critical policies, plans, and contact information.
- Provide new members with the previous year's meeting minutes.
- Identify a few key concepts and continue to touch on them throughout the orientation.

Chapter 3 – Communicating with Your Board

“Board members said it loud and clear: in the best nonprofits, the leaders tend to be, if not exactly ego-free, people who share power and make a habit of empowering others... For the CEO, this requires a significant commitment of time and creative energy to stimulate boards to engage.”

- June Bradham, *The Truth About What Nonprofit Boards Want*

Communication is critical in any group. If the left hand doesn't know what the right hand is doing, they may work at cross-purposes. Communication can be particularly challenging when working with nonprofit boards for a host of reasons:

- the board members serve as volunteers,
- some are much more engaged than others,
- they have diverse backgrounds, and
- they all have their own opinions about the foundation's priorities and the needs of the community being served.

If you want to reach that “sweet spot” where your organization is performing at its best, communication with your board must be not only regular and transparent, but perceptive and inspired. That is what it will take to motivate board members to rise above all the demands and distractions of daily life to give their best to your noble cause.

Assessment

Take this quiz to determine your community foundation's level of effectiveness in this area:

1. Board meeting minutes are distributed within three business days.
2. Board packets are distributed at least one week prior to the board meeting.
3. The CEO meets individually with all board members on a regular basis.
4. A plan exists to communicate regularly with emeritus board members.
5. Updates are created specifically for board members and are sent out at least quarterly.
6. Committee minutes are distributed to all board members.
7. There is a check back with new board members after 6-9 months of service.
8. There is an effective process in place for sharing breaking news and communicating urgent/emergency issues.
9. Board members have access to a password protected area on the website.

10. Board meeting agendas are sent out in advance as tentative. If there are changes to the agenda, a new agenda is distributed at the board meeting and changes are clearly indicated.
11. At the end of the meeting, each board member critiques the meeting.
12. Time is allowed for an Executive Session, in which no staff are present, as part of each board meeting.
13. Board meetings happen even if the CEO is absent.

Stories

Here are stories illustrating this topic from other community foundation leaders:

Inappropriate Communications

Our board members each sign an agreement related to confidentiality. Unfortunately, they sometimes forget about their commitment to confidentiality and “leak” information prematurely. Once, the day before the board meeting in which the board would be approving grant recommendations, I received an email from a grantee whose grant was being recommended for funding. The grantee contacted me to express how happy she was that they were receiving a grant and asked if I would email our logo for use on the brochure promoting the event! One of our board members had advised this grantee that their grant application had been approved, when, in fact, the board had not yet met.

What I Learned: Some things, like the board confidentiality policy, cannot be mentioned often enough.

What I Wish I Knew

- Don't underestimate the importance of maintaining positive relationships with each individual board member. Sometimes a disgruntled board member resigns or grumbles quietly until they roll off the board. But sometimes they bring down the morale of other board members or staff. And sometimes it is the CEO who pays the ultimate price for their discontent.
- There are five key elements that must be present for effective communication to occur. As presented in *The Five Dysfunctions of a Team*, by Patrick Lencioni, those elements are:
 1. *Trust* – It takes constant effort to create and maintain an environment of trust where board members feel free to ask questions and state opinions without fear of recrimination. This may be a particular challenge to new board members who often assume, wrongly, that they have nothing to add to the discussion. In order to communicate effectively, board and staff must be willing to openly share opinions and ask questions. Additionally, they must be willing to admit error,

acknowledge and appreciate the experience of others, and listen completely before arriving at a conclusion. Finally, all personal agendas must be left at the door. This should be explained when interviewing potential board members and again at board orientation.

2. *Embracing Conflict* – Open, honest communication cannot occur until the entire team (board and staff) learn to welcome conflict. Try it! Your meetings will never be boring again, and the team will effectively cover all necessary points of discussion. The entire team loses when board members fail to state their opinions because of fear of recrimination. The key to success is to create an environment of respect where all points of view are heard and discussed. Thank board members – especially the new ones and quiet ones – for stating their opinions. Ensure everyone has an opportunity to speak.
3. *Mutual Commitment* – All team members must be committed to the same goals, and these goals need to be understood by all. This gives the team clarity of purpose, common sense of direction, and mutually agreed upon goals. This also enables the team to identify opportunities, prioritize resources and work towards the common goal. Mutual commitment will also help teams to avoid the “beating a dead horse” syndrome. If the goals are clear and agreed upon, discussions can proceed in a positive and efficient manner. Board meetings will be focused, and board members will leave with a sense of accomplishment.
4. *Accountability* – Board members and staff must have clearly articulated roles and responsibilities. This begins with having written job descriptions for all staff members, board members and board officer positions. When an individual is performing poorly, it is imperative that they become aware of the performance expectations for their position. Too often, board members join a board of directors expecting to attend one meeting a month and not much else. After about 6 months it becomes clear that they are not able to or willing to do much more. Open and honest communication about their role must occur, along with a graceful exit strategy, if needed. Of course, the best way to avoid this situation is to ensure that prospective board members clearly understand the expectations. This will save time and hurt feelings in the long run.
5. *Focusing on Results* – Boards that plan and communicate effectively not only establish clear goals and objectives, but they also focus on the results they are getting toward those goals. This will result in a higher level of success and will encourage individuals to set personal agendas aside for the good of the entire organization. Also, meetings will be focused, and the team will enjoy a common sense of accomplishment.

Red Flags to Watch Out For

- *Insufficient information.* While board members often prefer bulleted executive summaries to white papers and long PowerPoint presentations, they must have

enough information to do their job. However, you transmit it to them, be sure they have the basic facts and an appropriate context for understanding decision-making information.

- *Last minute information.* If you are bringing a big issue to the board, provide information for their consideration in advance of any meeting where the issue will be discussed. Many people like time to reflect on complex issues before acting.
- *Board members who don't have email.* For many foundations, email is a critical means of communication with the board. A board member who lacks email will fall behind and be unable to fulfill basic board duties. You can screen for email use during recruitment. Unless you are especially seeking older or lower-income candidates, or serve a rural area with spotty internet access, you may want to make it a requirement that board candidates already be established email users. It's best if the board member has a computer with internet access at home, but if not, the public library may be a solution.
- *Parking lot conversations.* If board members are discussing substantive foundation business in small groups after board meetings, instead of in them, you have a problem. Work on building trust among board members, and welcoming conflict during meetings. The board chair can remind members to share their concerns during official meetings. Incorporating a regular executive session into your board meeting may also help if board members are holding back during meetings because they don't want to confront the executive director or hurt anyone's feelings.

Practical Tips

- Recognize board members' birthdays and anniversaries, and other significant events in their life, such as retirement or birth of a grandchild.
- Give them handwritten thank you notes.
- Send thank you notes to their spouses (they are the ones sitting home, babysitting, picking up the slack....).
- Develop a process for board members to communicate with each other, such as a private listserv.
- Place the board manual on a secured section of the website.
- Encourage all governance-level communication between board and staff to be through the CEO.
- Remember that your board members all communicate differently. People learn in different ways, so try to accommodate multiple styles.
- Communicate often; communicate well.
- Leave opportunity for the board to meet without the executive director and other staff present at some point during every regular meeting.
- Have a policy as to which staff can and/or should attend the board meetings and their role at the meeting.
- Seven signs that your board is not communicating effectively:
 1. The board avoids conflict altogether.
 2. Board members become defensive during discussions.
 3. Certain board members feel the need to always be right.
 4. Board members assume they can read the minds of their counterparts.
 5. The board fails to listen when less assertive members are speaking.
 6. Board members turn lively discussions into win/lose situations.
 7. The board avoids discussing difficult topics.

Chapter 4: Board Development and Training

“Excellence is an art won by training and habituation... We are what we repeatedly do. Excellence, then, is not an act but a habit.”

- Aristotle

People are any organization’s greatest asset. Just as with staff members, you can make the most of your board members by continuously developing them. Board development occurs during formal training sessions, when you bring in outside experts or use the internal expertise of your staff to present information. Equally important are the everyday learning moments that happen in your board and committee meetings, when staff and board peers help board members learn new things and hone their leadership skills. By building learning into your monthly and annual board routines, you can train your board for excellence.

Assessment

Take this quiz to determine your community foundation’s level of effectiveness in this area:

1. Experts are engaged to provide training to board members in various areas relating to foundation operations.
2. Experts are engaged on a regular basis to lead strategic planning activities.
3. The board president and mentors check in at regular intervals with new members to assist with their development.
4. Each board meeting contains an education segment on the agenda.
5. Officers or committee chairs provide learning activities that relate to ongoing policy decisions.
6. Board members conduct periodic self-assessment to gauge training needs.
7. Board members are encouraged to attend regional, state and national training sessions/conferences.

Stories

Here are stories illustrating this topic from other community foundation leaders:

The Long Process of Rebuilding a Board

After 16 years of organizational leadership by an executive director that managed the board – rather than vice versa – the executive director reluctantly retired. Her successor found herself facing a dysfunctional, undirected group of people who had no input or responsibility

for the management of the organization. They lacked the basic knowledge of board responsibilities and duties. Years of mismanagement had resulted in vacant seats and disengaged people.

Consequently, the new executive director has spent the first two years of her employment searching for board members who will lead the organization, struggling with removing the nonfunctional and disruptive members and rebuilding the board, when her energies should have been directed towards donor development and addressing a \$1 million operating deficit.

What I Learned: Board-building requires ongoing attention and can seem time-consuming to the busy executive director. However, it's a lot more efficient to diligently "build as you go" than to neglect board development, which can lead to a long-term clean-up situation.

What I Wish I Knew

- Absent board members affect the work of the board – constantly having to “bring someone up to speed” eats into productive conversation and action time.
- One of the first signs of a disengaged board member is absence.
- You can never over-train a board member.
- Most board members take a year or more (depending on the frequency of your meetings) to “catch on” to the operation of the foundation.

Red Flags to Watch Out For

- *Dropouts.* Board members who suddenly stop attending meetings, and don't share the reason, are a cause for concern. If you have such an occurrence, you or a board leader need to have a heart-to-heart conversation with the person who has pulled a disappearing act. You may find that such a board member does not feel needed or engaged, in which case you can remedy this situation. Or if a board member witnessed something that she found unacceptable, you need to know about it so you can address that situation, too.
- *Loose cannons.* Board members who don't abide by the usual expectations for such a position, such as those who freely speak with a lack of loyalty to the organization, can do a lot of damage to your foundation. A foundation leader must intervene at the first sign of trouble. If an offending board member does not show remorse when the problem is brought to his attention, he should be asked to step down. You need people on your team you can trust.

Practical Tips

- Never assume everyone knows what you're talking about. They may be new, may have been absent the last time you covered that topic, or may not have been paying

attention the last time you brought up the subject. Give a 1-2 sentence recap when you resume discussion on a topic.

- Be careful with acronyms for the same reasons as above.
- Ask board members to be the “trainers” – it’s good when the executive director isn’t the one doing all the talking. Plus, having to explain a concept to others helps in the learning process of the teacher.

Chapter 5 – Board Accountability

“In dreams begins responsibility.”

- William Butler Yeats

Board members hold the collective privilege of dreaming on behalf of your mission and community. Concomitantly, they also have the responsibility for ensuring that your foundation has the resources to achieve the ends it has dreamed – and that you get there by sound means. Obviously, the board does a critical job for your mission. That’s why holding the board accountable, while hard to do, is so important.

Assessment

Take this quiz to determine your community foundation’s level of effectiveness in this area:

1. The board has a process in place to hold its members accountable for their attendance.
2. The board takes specific steps to ensure that members participate actively in board discussions and decision-making.
3. The board takes specific steps to provide legal oversight of the foundation.
4. The board takes specific steps to provide oversight of foundation operations.
5. The board has a process in place to hold its members accountable for their participation on committees.
6. The board has a process in place to hold its members accountable for their financial support of the community foundation.
7. The board takes specific steps to sanction board members who do not comply with their responsibilities.
8. The board uses a self-assessment tool at least annually and change occurs because of the self-assessment.
9. The board has legal counsel present at each of its meetings.
10. The board has a system in place to measure achievement of goals identified in the foundation’s strategic plan.
11. The board holds itself accountable for creating positive community impact.

Stories

Here are stories illustrating this topic from other community foundation leaders:

Every Rose Has Its Thorn

Once upon a time, we had a new board member who was outstanding. He always pitched in when asked, volunteered to help, made contacts, and had contacts. He quickly elevated to a leadership role on a significant committee of the foundation. Once he was in a leadership role, he became domineering. Following every board or committee meeting, this board member would come to the executive director and “explain” why the decision the board made was incorrect.

However, this board member would not have brought any of those issues up at the board meeting.

He would then go to the committee that he chaired and again, “explain” why the board made the wrong decision. He began negatively impacting the other members of his committee, and they concurred with “his” version of the events.

After one of the meetings of the committee on which he served as a member (not chair), I gave a very general overview of the budget that had been presented for the coming year. As expected, he came to see me after the meeting. He demanded to know why he had not been consulted in the preparation of the operating budget. (In prior years, the chair of the committee he served on did not provide such input.)

Although I had kept our board’s president aware of the situation, the president took no action with this individual. The president did, however, make a concerted effort to encourage discussion and provide additional opportunities for this board member and others to express concerns about board decisions. As this board member would soon have served his maximum number of terms on the board, it was determined that we would wait him out.

What I Learned: Sometimes it is hard to tell who is going to be a difficult board member. When troubling behavior occurs, the leader of the board should nip it in the bud. Failing that, sometimes you must wait for the difficult board member to complete the current term.

The Rogue Board Member

Sadly, not all board members volunteer to serve for the right reasons. Sometimes, board members volunteer to serve in order to further a personal agenda, build a resume, or give their favorite non-profit an advantage in grantmaking. Dealing with these board members can be difficult and time consuming. Very often in this type of situation, the executive committee or Governance Committee needs to step in and handle the difficult board member.

A community foundation executive director found herself in exactly this type of situation. The foundation was leading a community effort to build a Community Learning Center. A particular board member, we will call him Stan, was very anxious to serve on the Community Learning Center planning committee. Stan also served on the local school board and several other nonprofit boards. As the planning progressed, it became apparent to the other members of the committee that Stan wanted the local school and another nonprofit to be very active in the Community Learning Center. If Stan had his way, the high school alternative school would have occupied the Community Learning Center most of the time, thus decreasing the classroom availability for the adult learners in the community pursuing college degrees through distance and on-site classes. The planning committee and the foundation's executive director made it clear that this was not the purpose of the Community Learning Center and his plan was not moving forward.

Undaunted, Stan decided to "take it to the people." Unbeknownst to the executive director or the planning committee, he called a public meeting to discuss his plan. The executive director found out about the meeting and showed up. Stan was surprised.... The meeting went on, but the executive director was able to present the planning committee's ideas and the group present agreed with their overarching philosophy.

The executive committee met with Stan. After a lengthy conversation, both parties decided that Stan and the community foundation board of directors were "not of like minds" and Stan resigned.

What I Learned: When dealing with a difficult board member, very often it is the responsibility of the executive committee, not the executive director, to handle the situation.

What I Wish I Knew

- The board chair and the executive committee are responsible for holding the rest of the board accountable.
- Creating a dashboard for the board helps them be more accountable.

Red Flags to Watch Out For

- *Deference to committees or officers.* While the work of committees is critical, and board officers are usually among your most committed board members, the board

must not be overly deferential to these groups. The board is charged with the governance of the foundation, and each member is individually liable for any significant breaches. As their job descriptions define it (or should, if they don't), officers and committees report to the board, and they are accountable to the full board – not the other way around.

- *Strong – and weak – board links.* Sometimes well-meaning board members take it upon themselves to pick up the slack on the board for creating community results, providing legal or operational oversight, or ensuring sound board mechanics. If you notice this happening, call it to the board's attention. All board members, not just particularly conscientious ones, should be staying on top of basic board duties.
- *No-shows.* Board members should understand that they are accountable for decisions made at board meetings, even when they are absent. That can serve as a motivator to someone who thinks “they won't miss me if I don't attend.” They don't get to second guess the decisions made in their absence, or publicly distance themselves from those decisions – instead, they should be there to participate in decisions when they are being made.

Practical Tips

- The board president must model appropriate behavior for the other board members.
- Rules in your by-laws concerning board expectations may help you deal with expulsion of a difficult board member. If you don't have such rules, spell out the process for removing board members the next time you revise your by-laws.

Chapter 6: Volunteer Management

“Accept the fact that we have to treat almost anybody as a volunteer.”

- Peter Drucker

What does it mean to treat someone as a volunteer? Most likely, what business guru Peter Drucker meant by this was that volunteers must be treated graciously and thanked sincerely for their contributions (and so should anyone else whose contributions are important). While it is certainly true that volunteers deserve support and appreciation and will volunteer longer and more effectively with your organization if they get it, volunteering is not a one-way street. A well-matched volunteer enjoys intangible benefits from her association – personal relationships, participation in a meaningful cause, and the satisfaction of being useful. And volunteers who experience such rewards can become not only good helpmates, but excellent advocates for your cause.

Assessment

Take this quiz to determine your community foundation’s level of effectiveness in this area:

1. The foundation provides volunteers meaningful opportunities to help accomplish its goals.
2. Volunteers are protected by and work under the same or equivalent policies as staff members of the foundation.
3. The board of directors and staff are committed to using volunteers in carrying out the mission of the foundation.
4. The foundation has a planned approach for volunteer involvement, providing policies, resources, and management to the volunteer program.
5. The foundation has put in place a screening process for volunteers.
6. Volunteers are provided with an orientation to the organization, its policies, and practices, including the rights and responsibilities of volunteers.
7. Volunteers receive training customized to the volunteer assignment and individual needs.
8. Volunteers receive an appropriate level of supervision and have opportunities to give and receive feedback regarding their work.
9. Any volunteers working with youth receive guidelines and oversight sufficient to ensure appropriate interaction with youth.
10. The impact of the volunteer program is periodically evaluated to ensure the needs of the foundation and volunteers are being met.
11. Effort is made to recruit and select volunteers from a broad range of backgrounds and experiences to represent the community served by the foundation.
12. All volunteers complete an application.
13. All volunteers are provided with a written job description.

Stories

Here are stories illustrating this topic from other community foundation leaders:

A Real Steal(er)

While we welcome volunteers at our community foundation, we don't get a lot of potential volunteers helping to stuff envelopes or file paperwork. It came as a surprise one day, then, when our finance director received a call from a young woman asking to volunteer in our finance department.

We had been debating the merits of performing background checks on potential volunteers, and this woman seemed unlikely to be a problem. Not only did she have a college degree in finance, but she also had experience working as a volunteer in one of our large local universities.

Nevertheless, our finance director made the decision to ask for a background check, and the volunteer agreed.

We were surprised, then, to learn that this woman had not one but two arrests for embezzlement. While one had been plea-bargained, she had served time for the second. When we confronted her with the information, she ended the conversation and never approached us again. It was clear also that the large university did not perform the same background check!

What I Learned: Do your due diligence with volunteers just as you would for staff with similar responsibilities and information access. The risks are the same.

Going Above and Beyond

Our foundation sought a volunteer to help in the office with folding mail, answering the phone and filing. We had a wonderful, dedicated elderly woman volunteer, whom I'll call Mary. Mary worked with us for several years until her health prevented her from continuing.

One day when Mary was volunteering, our staff member walked into the volunteer work area and found Mary passed out at her desk. She couldn't revive her and immediately called 911.

Fortunately, that staff member also knew Mary's son and called him. We learned later that Mary suffered from low blood sugar and wouldn't take a break to eat her lunch because she didn't think that was appropriate when she was volunteering!

What I Learned: Volunteers need to know that you care about their well-being and desire to make reasonable accommodations to meet their needs, just as you would with a staffer.

What I Wish I Knew

- Free is not without cost – the time you spend to work with volunteers is valuable, so it pays to evaluate what kind of volunteer positions will be worthwhile for your foundation. Using volunteers does not always save staff time.
- Some of the best relationships and relationship-building come as a result of involving volunteers. Volunteers can be great ambassadors and donors for the foundation.

Red Flags to Watch Out For

- *Eager beavers.* Be cautious with people who are overly anxious to volunteer. They may have hidden motives.
- *All in the family.* Volunteers, who are related to or in a relationship with staff, if used, require the same supervision and accountability as for anyone else. In such a case, it may work best for the supervisor not to be the volunteer's personal connection at the foundation.
- *Free agents.* Volunteers need proper support in order to be productive and enjoy their work – and to protect your foundation as well.

Practical Tips

- Keep some medical forms and emergency information about volunteers in a file that can be accessed in case of emergency.
- Be sure to give volunteers public recognition for the valuable work that they do.
- Always say thanks and treat volunteers with respect.
- Don't just give volunteers the "dirty work" to do. Give them meaningful work.
- Match the skills of the volunteer with the work to be done.
- A volunteer program may not save time - they require ongoing training and supervision, and volunteers can be a liability. Look before you leap.

Questions?

Have questions about this information? Please contact us.

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