Leadership in a Volunteer Organization

A Workshop

Purpose: To present and discuss ideas for effectively leading volunteers in the Navy League.

Learning Objectives:
1. Understand the critical success factors for the Navy League’s Volunteer Leadership Model.
2. Learn the Navy League’s Five Step Delegation Process.
3. Discuss the role of measurement in effective leadership practices.
4. Understand the importance of providing training to volunteers.
5. Learn how to give feedback to volunteers.

Agenda:
1. Overview of the elements of the Volunteer Leadership Model.
2. Delegating assignments to volunteers.
3. Importance of measurement.
4. Determining training needs.
5. Giving feedback – “I messages”.
6. Role play – “Giving Feedback”.
7. Next steps.

Limit: One Hour
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Volunteer Leadership – An Overview

All of us have experienced leadership practices in business, in the military, at home (yes, your mother’s leadership practices affected you!) and in volunteer organizations. What are the behaviors you have observed (or used yourself) that made for effective leadership in a volunteer organization? What behaviors are ineffective in a volunteer organization? Prepare a list below of your thoughts. Rank the items on each list by their importance to making the organization successful (effective) or unsuccessful (ineffective).

<table>
<thead>
<tr>
<th>Effective</th>
<th>Ranking</th>
<th>Ineffective</th>
<th>Ranking</th>
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The facilitator will now ask you to share your lists with others in the class as we prepare a composite list.
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The objectives for this workshop are listed on the Agenda. We’ll now explore how we can apply your knowledge of leadership into an effective Volunteer Leadership Model.

**Volunteer Leadership Model**

Most of us have worked in a paid position at some time and know that the business world looks for “a day’s work for a day’s pay”. Volunteers aren’t paid, so money is not what motivates them. Many studies have shown that people volunteer for one of three reasons:

- **Achievement** – they want to give something back to society (the charitable impulse).
- **Affiliation** – they want to meet new people or associate with people of like minds.
- **Power** – they want to be in a leadership position and influence the direction of the organization.

Obviously, not everyone joins the Navy League to lead the organization, so the first critical success factor for our Volunteer Leadership Model is to provide opportunities for all three types of volunteers. Can you think of examples from your council when the assignment was mismatched with the volunteer?

The second critical success factor for our Volunteer Leadership Model is to provide meaningful work for our council volunteers. Again, studies have shown that volunteers like projects – short assignments with a defined beginning and end, both in scope of work and time frame to complete. Volunteers must be able to complete assignments within their existing commitments to family, job and other volunteer activities. Furthermore, volunteers want to work in their area of expertise, using the skills they developed in the paid work force. Finally, volunteers want to engage in interesting, fulfilling, worthwhile tasks, rather than menial tasks. These elements – projects, expertise, schedule and task – lead to meaningful work, the second critical success factor.

The third and final critical success factor for our Volunteer Leadership Model is to use effective management practices with our council volunteers. The effective management practices presented in this workshop are:

- Delegation;
- Measurement;
- Training; and
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- Feedback.

Our workshop presentation and discussion focuses on effective management practices, but the first two critical success factors are presented where appropriate.

Delegating to Volunteers

The most significant insight about delegating to volunteers is that you can’t just “tell them to do it”. Many of us come from a Command & Control environment, where the boss says “I want it” and we say “I’ll do it”. Volunteers expect leaders to use persuasion, rather than direct orders. In fact, the two most important phrases in a volunteer organization may be “please” and “thank you”! We are not suggesting that you have to beg, but rather that you follow a delegation process that is interactive and almost foolproof. Here is the Navy League’s Five Step Delegation Process:

1. Step One - Set The Expectation. As leaders, we are expected to understand what we want. Therefore, completely defining the task is our first step in delegating. Remembering our Volunteer Leadership Model, the task should have a clear scope of work and time frame for completion. The task should be meaningful, worth doing, and within the volunteer’s technical capability. The person being asked to complete the task must have an opportunity to discuss the task with the leader to ensure understanding. This person must also be appropriate for the task – someone who is looking for affiliation should not be asked to work on a task that needs an individual contributor (work alone to complete the task).

2. Step Two - Establish the Measurement. Measurement is the “hidden persuader” in an effective leader’s tool kit. If we don’t measure, how do we know if we succeeded? People want to know how they will be measured and/or judged, so leaders need to make sure they define the deliverables for every task. Consider the elements of “what?” “where?” “how many?” and “when?”. Compare “Please bring three 10-pound bags of potatoes to our picnic site by 8 a.m.” to “Please bring potatoes for the picnic?” Clearly, the first request has a high probability of being accepted and
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fulfilled! Included in the “when?” of measurement is the monitoring requirement – how often do you want progress reports and what do you want to be reported?

3. Step Three – Assess Capabilities. All leaders are guilty at some time of asking someone to do a task they cannot complete due to lack of experience, equipment or training. Yet people agree to take on tasks under these conditions all the time – and then fail to finish the task! The leader must verify that the person asked to do the task is capable of completing it. The most effective assessment technique in a volunteer organization is to ask the person if they have everything they need to do the job – training, experience, tools, or anything else. The scope and time frame (see Step One) may have to be adjusted based on this assessment and the availability of needed resources.

4. Step Four – Get Commitment. The assignment is not complete until the volunteer agrees to accept it!

5. Step Five – Monitor Progress. No-one like to be micromanaged, so the leader must be true to his/her commitment in Step Four to accept progress reports on schedule, not before or after. If a scheduled progress report is missed, find out why and revisit Step Three, if necessary (are additional tools and/or training needed?).

Measurement Primer

When leaders establish measurement for delegated tasks, there are some principles that should be followed. We use an acronym for effective measurement: MOA.

M – Measurable. Obvious, isn’t it, but most of us have worked on a task or project that wasn’t measurable, at least in the traditional sense. Physical measurement (time, distance, volume, cost, energy) is familiar to us. To be measurable, anyone can take the measurement and get the same results, as long as we’re using the same tool and have the same level of training or experience.

O – Observable. If a measure is observable, we have a common understanding of what is being measured. What are some outputs that are not observable without further definition? What about “good”, or “quality”?
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What do I measure if you ask for “a quality product with good functionality”?

A – Attainable. Leaders must not expect the impossible when delegating a task. Remember the Go Getters Creed: The difficult we do right away; the impossible takes awhile.

Yes, people will agree to an impossible task and then do nothing. The leader needs to avoid this situation by being sensitive to MOA.

Training Needs

Determining training needs for volunteers is a very difficult task because we generally don’t have personnel files or extensive experience working with the individual. The leader must ask very specific questions when determining whether training is needed to complete the task. “Have you ever worked with an Access database?” is much better than “Do you know how to use a computer?”. The results will be different, also, if you are asking a volunteer to put your membership records in an Access database! The subject of computer expertise is a difficult one for leaders, since many Navy League volunteers have not learned to use a computer. There is training available at low cost at local colleges and community centers, or you can use the Navy League discount at CompUSA to get training. The subject of “who pays for it?” must also be addressed. If the council will not or cannot pay for training, the task may have to be assigned to someone else.

Feedback

Leaders often have to address volunteers who do not complete commitments, or are late. The key issue here is not to let the incomplete or late task completion pass without addressing it! Hyman Rickover said it best, when he declared “What you tolerate is what you expect!” You owe it to the volunteer to discuss the situation with him/her and seek satisfactory resolution.

The method for giving non-threatening feedback that is recommended in this workshop is the use of “I messages”. The I-message gets away from the You-Me emotional
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accusations by stating how the leader feels about what has just happened and asking the volunteer to help the leader get a satisfactory result. Here’s a typical I-message:

When a presentation isn’t ready for the Board Meeting on time, I get frustrated and angry because the Board’s time has been wasted, we can’t make a decision without the data. What can we do to make sure presentations are ready when scheduled?

The elements of the I-message are
• A description of the behavior or defect observed;
• How the leader feels about the situation (the actual I-message);
• Why the leader feels this way; and
• Ask for help to prevent recurrence.

The volunteer gets a message that the leader has a problem and is asking for help, rather that the leader accusing the volunteer of failure and forcing him/her to get defensive. I-messages work, but practice is necessary before leaders will use them instinctively.

Exercise

Purpose: To practice using I-messages.

Action: 1. Choose groups of three for this practice session.
        2. Determine who is the leader and who is the receiving volunteer for the first role play. The third member of your group will observe the role play.
        3. Write an I-message for the following situation: One of your Board members called another Board member “an idiot” during your meeting. You are giving feedback to the offending Board member after the meeting.
        4. Role play the feedback session with your partner.
        5. Share results: How did the leader feel? How did the recipient volunteer feel? What did the observer see?
        6. Rotate roles. Repeat steps 3-5 for the following situation: The Membership Chairman lost three new member applications and the checks that had been received.
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7. Rotate roles. Repeat steps 3-5 for the following situation: Your Treasurer did not prepare the monthly financial summary for the Board Meeting.

Limit: This exercise should take 20 minutes.

Follow-Up

Take a few minutes to review the items discussed in this workshop. Which ideas will you use for leading your council? Do you feel comfortable with both the concept and the practice of these techniques? Use your answers to these two questions to prepare an action plan,

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<tr>
<th>What actions do you plan to take?</th>
<th>Who will help you do it?</th>
<th>When will it be done?</th>
<th>How will training be completed?</th>
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The End!