



Dancing the Leadership Tango

2:30 p.m. – 3:30 p.m.
Wednesday, August 8, 2007
NABE Annual Meeting
San Francisco, California

Diane Minnich
Executive Director
Idaho State Bar

Thomas R. Tinder
Executive Director
West Virginia State Bar

Diane O'Steen
Executive Director
Atlanta Bar Association

Robert S. Wells
Executive Director
South Carolina Bar

Volunteer Management: Don't Cut the String, Tie a New Knot

Why do some former volunteers seem like bad house guests?

More importantly, what can you do about it?

By: Jeffrey Cufaude

"If only they would just let go."

This has to be one of the most frequently uttered remarks in the association world. Volunteers and association staff members alike utter it in reference to individuals who seem unwilling to relinquish their say in matters once their elected or appointed term of office has concluded. While some individuals without a doubt try to "keep their hands in things" long after their official time for doing so is over, it may be for a good reason: They still care.

How might your association react differently if you focused on the individuals for whom this is the reason they still ask questions, offer suggestions, or engage in other behaviors often misconstrued as meddling or being a control freak? How might your association continue to reap the rewards possible from the involvement of invested volunteers, those individuals who care deeply about the profession or industry and the association's place in it and who want to make a contribution, not out of self-interest but to advance the greater good?

"Letting go" is a term pervasive in any discussion of volunteer transition. From the association's perspective, the ideal act of letting go means the volunteer graciously steps off the mountain summit, making way for the next volunteer. It's only an issue when the volunteer has to be continually dragged off the mountaintop. From the volunteer's perspective, the picture might look quite different. It might resemble a trapeze artist who is high above the surface and about to make the leap of faith of letting go of one bar and reaching out to grasp another. The challenge in managing the transition of invested volunteers is that often they don't know (or aren't mentally prepared for) the new bar they have to grasp.

The Experience of Transitions

In his work on change and transitions, noted author William Bridges describes this phenomenon as part of a three-stage process: endings — the point of transition away from something; the neutral zone — the process of learning to let go and of looking for something new; and new beginnings — the point of transition toward something new. While more can always be done, most associations are pretty effective with managing the endings from the recognition standpoint. Volunteers are acknowledged in front of their peers for the contributions they have made, and we celebrate their achievements at awards banquets, annual meetings, or in other high-profile ways.

While appropriate and nice, these gestures do not begin to manage the range of issues that a volunteer may experience at the end, which could include such things as having access to the most timely and intimate information about association efforts; being a part of the community of volunteer leaders, many of whom become a significant part of

their personal and professional support network; being exposed to new knowledge or having the opportunity to develop new skills; and feeling like they are an important part of advancing the profession or industry. Associations should remember that in some cases, individuals experience a level of acceptance and appreciation when volunteering that they do not get from their paid work. When their volunteer commitment concludes, the ending (or at least diminishing) of this acceptance and recognition, as well as their sense of community and contribution, can be a great loss.

Perhaps rightly so, the bulk of an association's attention is focused on orienting the new volunteers rather than focusing on those leaving office. However, by ignoring the real issues involved with the ending stage, associations can make it more difficult for volunteers to manage the neutral zone. In the neutral zone, people have let go of some of their beliefs and practices but have yet to form the new beliefs and habits that can provide reassurance and guidance. Without guidance or support, these individuals might stumble around trying to figure out how they fit in the new order of things or try to hang on to the old order.

Over time, however, individuals develop new rhythms and are able to engage in new beginnings, fully committing themselves to a new way of being or engaging themselves in their organizations. Associations can help individuals find their new homes more intentionally by having an overall vision for the type of volunteer community they are trying to create. This should include plans for managing individuals' transitions not only *into* positions of responsibility within the community but also *out of* positions or project responsibilities. As volunteers often represent more human capital than an association may possess in its staff ranks, it makes good business sense to manage these human resources thoughtfully. Nancy Axelrod, principal of Nonprofit Leadership Services, says the challenge to do so is twofold: first, in finding ways to recognize and honor the service of volunteers who have completed their official terms in a specific role or with a specific project; and second, designing ways to gather the intellectual, social, or political capital that many volunteers are likely to continue to add to the organization. Many associations have implemented some simple strategies for doing so.

Strategies to Manage the Neutral Zone

- **Keep their counsel.** Sharon Swan, CAE, executive director of the American Society for Clinical Pharmacology and Therapeutics, suggests that associations develop a special e-mail list or other communication system so these individuals can be used as a "kitchen cabinet," a team of trusted advisors. "When issues arise where particular former leaders have expertise, make them one of your first points of contact to gather insights and perspective," advises Swan. When Swan is seeking counsel on issues related to corporate fundraising, she often turns to a former president who was exceptional at raising money.

Tracy Kane, member relations and services director for the American Association of Critical-Care Nurses (AACN), notes the association regularly solicits these former leaders for input on key initiatives and the continuing work of the association. Tapping into their perspectives for the association's annual environmental scanning effort also is

a strategy AACN has employed. Asking them, "What are you hearing from members?" can be a thoughtful way to leverage the relationships these individuals have in your association's community.

- **Keep them informed.** Feeling uninformed is one of the greatest challenges some volunteers experience when their tenure has concluded. While they may have once dreaded the barrage of e-mails and board packets sent their way, cutting them off cold turkey leaves them no longer "in the know." Marsha Rhea, CAE, senior futurist with the Institute for Alternative Futures, notes that "while they can still read about what the association is doing in regular communications sent to all members, they no longer have a good sense of the why." Without this sense, it could be difficult for them to be supportive of new directions, perhaps resulting in the type of grumbling that frustrates the new leadership team. Rhea recommends that the board chair or CEO send periodic communications to fill the gaps in the strategic direction these leaders once had firsthand.

- **Keep their contributions.** As one association executive anonymously remarked somewhat in jest, "Now that we've finally gotten them trained, they are out the door." Behind the sarcasm is a compelling observation. Invested volunteers have reached a point where they know the ins and outs of association workings and are more likely to get important work accomplished in an efficient manner. Because of this, it is important to find other ways for them to serve, according to Mark Anderson, CAE, executive director of the American Society for Surgery of the Hand (ASSH). Anderson offers four ways ASSH taps into its former board members:

1. Serving in an advisory role for the foundation;
2. Chairing a special task force with strategic importance to the organization;
3. Leading the development of new relationships and partnerships with other organizations; and
4. Leading the development of major issues for the strategic portion of a future board meeting.

Jack Advent, CAE, executive director of the Ohio Veterinary Medical Association, echoes the ASSH strategy of engaging former board members in strategic association efforts and pays particular attention to the outgoing president. "I encourage every incoming president to speak to the outgoing president about a month before the transition to talk about what items are in 'midstream' and what role the outgoing president would like to play in the next year," Advent shares. Such an approach could be particularly valuable when the past president plays no official role in the association's governance structure.

Having this conversation with all invested leaders is a recommendation of Jennifer Baker, director for risk management and member benefit services with the American Physical Therapy Association. She has found that while some volunteer leaders may be ready for a break, others will want to remain active. "This conversation offers the opportunity to discuss what being active now looks like to them and what new or different ways exist for them to contribute their time, energy, and skills to the

association." Baker believes having such conversations signals how much the association values volunteers' contributions. She also notes it can help individuals let go of their current role because they have a new role.

Rhea sees these conversations as being a real win-win for both the association and the individual. "I could imagine a really caring conversation that begins by acknowledging that sometimes associations get into ruts and don't see all the ways they might use individual volunteers effectively. Then I would ask, 'If you could try something completely new within the association, what would that be?'"

It comes down to caring. Fundraisers know the importance of retaining donors once they have been acquired — so much so that they even have a special category for donors who have not made a current gift: LYBUNTs or "last year but not this year." They aggressively go after these individuals in an effort to keep them on the donor ranks, recognizing the importance of maintaining and cultivating the commitment that led them to initially contribute. Associations would be wise to do the same, and doing so will require more attention being paid to the human side of volunteer transition.

Sure, some people start to get involved for personal or professional self-interest, but almost all volunteers who invest years of service do so because they care. These individuals want to contribute, to make a difference, to donate their time and talents to making something desirable become a reality. For some their caring will show up in the form of the annual-fund type of donor, the individual who makes a small contribution on an annual basis and can always be counted on to do so. Their gift in any individual year might seem small, but their accumulated contributions over time are great. Other volunteers may end up resembling the "go-to" donors, those individuals fundraisers turn to when they need lead gifts for a capital campaign or challenge grants to persuade others to contribute. Their contributions in any year might represent a significant portion of the overall donor base.

Being a good steward of all these gifts of caring from association volunteers, be they large or small, will build a committed community that will provide the capital necessary to realize an association's mission and vision. People want to care. Associations need to care enough to let them do so.

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A former educator and association executive, Jeffrey Cufaude writes, speaks, and consults on a variety of leadership and organizational development issues for associations, corporations, and the stakeholders they serve. He can be reached at info@ideaarchitects.org and his frequent essays can be found at www.ideaarchitects.org.