

Feature

Getting Your Volunteers on Track ASSOCIATIONS NOW, August 2010

By: *Jacqui Cook*

Do you have a volunteer who's constantly talking down to staff or missing deadlines? Learn what needs to be done to get everyone back on track.

In hindsight, Donna Dunn, CAE, can see all the signs that she had a difficult member on her association's board of directors, beginning with the fact that everybody—from the other directors to the members to the staff—really liked him.

As CEO, she learned quickly what she'd inherited: If she made an unpopular decision, she could expect a phone call from him questioning it. If she discussed an internal matter with staff, it was guaranteed someone would share it with him and he would call her on it. The final blow to their relationship came when she had to fire someone for a serious offense and he intervened, asking her to keep the staffer on as a contractor.

That episode ended with Dunn's departure from the organization. She's long since moved on—she's now CEO of the Association of YMCA Professionals—but she still carries the lessons from that experience to every position she holds.

"I can see now that he saw leadership as a chance to make his mark," Dunn says. "And to him that was a constructive way to do it. I don't regret it. I look back and I see it was one of those business situations where there was nothing I was going to do to change this."

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Ask anybody who's been in association management for more than six months, and chances are they have a story like Dunn's to tell about the volunteer leader who was a bad fit for the job. The person is overcommitted and keeps missing deadlines. He or she wanders off topic during every meeting or conference call. The person does not respect the input of the CEO or executive director. Sometimes, it's just a personality trait that can put everyone on edge.

No matter what the situation, it can quickly turn toxic without swift action by the CEO or another staff leader. But what should—or shouldn't—you do? How do you gently tell the person he is creating a problem, without alienating that person plus his friends among the membership?

Start at the Beginning

Guy Barone, principal of Barone Consulting, has been involved in associations and nonprofit organizations as both a board member and as a consultant. He thinks that without question, the number-one way to avoid problems is to set expectations clearly at the start of the relationship. This way, if problems do occur, the CEO can go to the volunteer and discuss her behavior relative to the objectives they both agreed upon.

"Board orientation is extremely important because it's through that orientation that you set behavior expectations and you charge each of your board members with their responsibilities," he says. "Then, if you have an ongoing problem, you need to take the person aside. If that person says they're fully on board with the mission of the organization, then a lot of the issues can be worked out. If there's a disconnect with regard to the mission, then it's time for the board member to move on."

Neal Couture, CPCM, executive director of the National Contract Management Association (NCMA), takes this one step further with a written contract for volunteers to sign at the beginning of a term or a project. The contract, which he says is a moral agreement, grew out of a situation he had with a volunteer who had promised to deliver an educational course. These courses make money for the association and are popular with the membership, so not having it would create a major problem for NCMA.

"There is a production schedule for drafts and the person was missing deadlines and kept stringing us along, saying 'I intend to do it. I'm almost done. ...'" Couture says. "I eventually got him to the point where he admitted he wouldn't deliver on schedule, so we brought in another volunteer to help. What we figured out was that after a couple times sliding, chances are this is going to repeat. They either procrastinate or just can't handle the assignment."

NCMA devised a new system for working with volunteers involved in a revenue-generating product. They are now asked to sign a contract that states the project, what the person agrees to do and when, and any responsibilities of NCMA. The volunteer and the NCMA staff person involved both sign the agreement. In addition, the volunteer is offered a small compensation, such as complementary admission to a conference or a renewal discount.

With this agreement in place, Couture and his volunteers have a way to measure success and determine if the relationship is working or not. Above all, the CEO must be sure the volunteer is contributing to the association.

"Don't let volunteers sink your ship," he says. "The success of your product and your association is completely tied to the performance of volunteers. If he or she starts on the path of not performing and you ride that horse too long, it can sink you."

Time Crunch

Even with an ironclad promise in place, there are still the inevitable emergencies that will crop up and eat away at the volunteer's already packed schedule. No matter what

the reason, there is a good chance something will come up that will put your association's project farther down the list of responsibilities.

Susan Tibbitts, account executive for association management company The Sherwood Group, recalls a previous position in which she clearly had an overcommitted volunteer leader. Shortly after she started working with him, Tibbitts noticed a number of things: He declined assistance to prepare for a committee meeting, ignored reminders about upcoming meetings, was late getting on teleconferences, was quick to abandon the agenda, and declined to review meeting minutes.

"Those are typical signs of a leader who is overcommitted, and I think it's extra common in associations," Tibbitts says. "It's almost never a situation where they are disinterested and don't want to do something. It's that they don't want to say no. They already are juggling too much, but busy, capable people don't want to say no."

Tibbitts approached the volunteer in a direct but nonconfrontational way, explaining that the association needed more of his time than he obviously could give. She made sure to listen closely and without interruption while he explained what was taking so much of his time.

"He didn't get defensive because I didn't set it up that way," she says. "I said, 'It's really clear to me that you have so much going on. You're someone who always returns calls and never misses a beat.' I treated the experience as an exception rather than the rule for this person. I didn't come in saying, 'Where were you? You said you'd do X, Y and Z, and you wandered off topic.'"

She suggested focusing his leadership on the specific areas where she needed him most, then working together to identify a few other committee members who could do some of the work he couldn't. The result was positive for everyone.

"This volunteer recognized that others had stepped up to move the agenda forward and was vocal with appreciation," Tibbitts says. "There are opportunities to delegate—that's what leaders do. Others step up into the broader role, and they feel recognized; you retain the leadership mantle, and the work gets done. That's meeting halfway."

Dave Bergeson, Ph.D., CAE, agrees with Tibbitts' assessment that these conversations have to be handled delicately, with staff leaders recognizing that these are volunteers, not employees. Bergeson, account executive at Association Management Center, suggests testing a volunteer with smaller projects and committee assignments before putting her into a board or committee-chair position.

"Observe how they work with a group. See how they communicate with staff," he says. "If this is someone you don't look forward to talking to about a minute thing, then you don't want them to become a chair you might have to talk to every day. You have to like them and they have to like you."

After 11 years in association management, Bergeson says he's also learned how not to take a difficult volunteer leader's comments or behavior personally.

"Relationships are hugely important in all this. That's a big part of my job," he says. "It isn't personal. It's not about me or anyone else. It's about the association and the timeframe or the lack of clarity about responsibilities. You can't take any of this personally."

Killing With Kindness

Teresa Evans-Hunter, CAE, learned firsthand that it can be hard not to take the situation personally when you are on the receiving end of a blistering verbal attack from a volunteer. When she was new to association management more than a decade ago, she called each of her volunteer leaders to introduce herself. One of them, a chapter relations volunteer, used her call to let loose with all the things about the association that had been bothering him.

"This guy blasted me with all these ill feelings and negative feelings about the association," says Evans-Hunter, now executive director of the National Association of Academic Advisors for Athletics. But instead of hanging up the phone and running, she vowed to figure out a way to make it work, especially because some of his comments about the association were true, even if she didn't agree with the way he was delivering them.

She decided to approach him and two other members about forming a task force to work on those issues. The group functioned as a liaison between that chapter and the whole organization. Her experiment worked very well: The volunteer went on to become president of the association a few years later.

"It was a matter of refocusing his energies," she says. "All he did was talk about negative stuff, and I said, 'You have such passion and energy. Come on, let's fix what's wrong.' He got more involved and went from being difficult to being one of my outstanding volunteer leaders, then becoming president. So it had a happy ending."

Unfortunately, there are some instances—usually at the board level—when the only happy ending is a permanent ending. Executive coach George Rounds, CAE, CPCC, says he's usually called in to mediate a difficult-volunteer-leader-versus-association situation when all other avenues of communication haven't succeeded. If mediation doesn't work, there probably is nothing left to do but consult the bylaws and legal counsel to find out how to remove a board member or other high-level volunteer leader.

"If all else fails, seek mediation," Rounds says. "Without that, it's going to be a big stinking pot. It shouldn't get to that, but sometimes it's necessary. And you have to recognize that it may end up with one party packing their bags."

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Dealing With Dissension

Executive coach George Rounds, CAE, CPCC, a former association CEO, offers these suggestions for handling a difficult volunteer leader:

Involve the CEO or staff liaison in the volunteer-leader selection process. That person will be working closely with the volunteer, so he or she deserves a voice. Keep in mind that the search for great volunteers should be a constant project.

Set expectations for both sides up front. Before the first board or committee meeting, decide what you want to accomplish and how you are going to do that. Figure out how and how often you will communicate. Also, decide what you will do if you disagree and cannot reach a resolution.

Know who your allies are and who's closest to the volunteer leader. You'll know whom you can count on for support if a conflict arises, and you'll have someone who can intervene on your behalf if the volunteer leader becomes difficult.

Blame the data. If a volunteer leader is pushing hard for a particular program to be added or expanded, use the association as a reason not to do it—not your own feelings about it. Explain that the money is not in the budget or the staff resources aren't there, and be sure to file the idea away in case it's relevant in the future.

Speak up early. If it's obvious the volunteer is stretched too thin, ask what's going on. He may be relieved to finally tell you. Also ask if he'd like to help you choose some other members who can help pick up things that aren't getting done.

Don't make it personal. It may be hard, but don't take problems with a volunteer leader personally. Also make sure your response is not a personal attack on the volunteer. Focus on the facts, not the people involved.

Know the rules of separation. Before even suggesting a volunteer step down, consult your bylaws for the proper procedure and discuss it with your association's legal adviser. Be sure every step is carefully documented in case of any future legal action.