

## Volunteer Leadership Training – Can We Get Beyond Orientation?

Why can't volunteer leaders do what is necessary to move our organizations forward?

### The Challenge

A chronic challenge for the not-for-profit sector is seeking out and retaining talented volunteer leaders. As a result, untrained, warm bodies are assuming leadership positions simply by showing up at meetings. This suggests there is a critical need for volunteer leadership training. Despite the need, we invest little in volunteer training. The lack of training to develop critical volunteer leadership competencies is holding back non-profit organizations, impeding their growth, and the realization of their full potential.

Without necessary training, volunteer service can be frustrating. A bad experience discourages individuals from offering their services again. Volunteers are often disappointed with their board or other volunteer experience because they are not able to achieve their goals, they are frustrated by the board's inefficiencies, or their inability to contribute causes too much stress. Volunteers often find themselves on a board, ready to contribute to their cause or favourite program and, rather than being allowed to contribute to operational aspects, they are thrust into a new area called governance with no experience in strategic planning, no experience dealing with complex issues and no knowledge of accountability.

Volunteers in leadership positions, even the most experienced, require training to understand their roles and responsibilities. They need knowledge and skills in order to capably and confidently discharge their responsibilities.

### Competencies

Not everyone elected or recruited has the necessary competencies to assume a volunteer leadership role. Volunteer leadership competencies reflect the knowledge, skills and attitude that contribute towards successful governance of the organization. Competencies are of critical importance to boards when hiring staff. They realize how important it is to have a Chief Staff Officer (CSO) with most of the 43 competency domains listed in the Canadian Society of Association Executive's Association Management Competency Standards. The CSO, in turn, hires competent staff. CSOs cannot operate effectively without effective staff. Likewise, they cannot operate effectively without an effective board.

## Who is responsible for volunteer leadership training?

Boards and staff are part of a partnership that moves the organization, and the requirement for competence goes both ways. Boards, with the support of the CSO, should identify and understand what specific competencies are required for volunteer leaders and other volunteers in the organization. A formal Board policy, acknowledging the required competencies, will set the stage for attracting, training and evaluation. Determine what training and development your leaders or other volunteers need to get things moving and improve effectiveness.

CSOs are often considered heroes who will work with whatever talent is on their Board. In some cases there is limited talent based on desired competencies and, therefore, the likelihood of success diminishes. Rather than accepting what is provided, a proactive move to enhance volunteer competencies through training must occur.

There is no single source organization mandated or responsible to establish volunteer leadership competency standards or guidelines and provide learning opportunities. There are a number of organizations that provide training, but the reach of each group is limited.

## Training

Board training isn't a new concept – it is, however, rarely provided. Some organizations train, or think they train, by providing an orientation. Orientations, when they occur, vary in delivery from a brief phone call, the provision of a manual to read, or attendance at a formal orientation session. AME student discussion indicates there are varying degrees of formal and informal volunteer orientation taking place, although many indicate making improvements in orientation is a priority. There is, however, limited training provided beyond orientation. An orientation manual may indicate what a particular policy is, but rarely provides training information on how to develop policy. Orientations are helpful, and contribute somewhat to increased effectiveness, but much more is necessary to enhance volunteer and leadership competencies.

Some training is available and being accessed. The Canadian Society of Association Executives (CSAE) provides a CEO Symposium where chief elected officers and CSOs receive training in roles and responsibilities as well as other leadership elements. The American Society of Association Executives provides an annual leadership magazine that CSOs are encouraged to distribute to their volunteer leaders. This magazine provides valuable knowledge on how to improve the board's and the organization's effectiveness. This very publication, *Association*<sup>TM</sup>, often addresses issues relating to governance and volunteer leadership. Private sector and not-for-profit organizations provide various workshops. These workshops are generally specialized training and not overly subscribed to due to access, time commitment and cost. Given enhancements in technology, perhaps now is the time for the promotion of Internet based e-learning courses or other training tools for volunteer leadership. The Victorian Order of Nurses (VON) is a charitable organization embarking on a project to make e-learning volunteer training available for its 15,000 volunteers. Coaching and mentorship are other methods to assist with training and development, along with providing access to relevant articles and Web sites. CSAE

also publishes a series of monographs for directors of non-profit organizations, including Duties and Responsibilities of Directors of Non-Profit Corporations. Board evaluation forms and other related information are available as well at [www.csae.com](http://www.csae.com).

Many organizations with thousands of volunteer leaders are receptive to enhancing capabilities in order to help their chosen organization improve its chances of success. If these leaders experience the benefits of training, they, in turn, may insist that other volunteers performing valuable tasks also receive training. Training for volunteers beyond the board is necessary. Training for fundraising, recruitment or other technical volunteer activities is required. Individuals involved in these activities are potential future leaders.

While my work on developing volunteer leadership competencies is still in progress (if you are interested, contact me) it is safe to say that training in the following areas will contribute to organizational effectiveness:

- Understanding and exercising governance roles and responsibilities
- Legal implications – decision making, liability, fiduciary responsibility and regulatory considerations
- Leadership, consensus and team building
- Running and participating in effective meetings
- Policy development and managing issues
- Developing plans and strategic outcomes – strategic and business, communications, marketing, fund-raising, advocacy and public relations
- Understanding performance measurement, performance indicators and accountability
- Understanding your constituency/members and two-way communications

Why is so little volunteer leadership training happening? "We can't afford it," is a common response, yet training budgets are set aside for staff. Lack of training for volunteers is costly in terms of lost productivity and missed opportunities. Even tinkering your current orientation and providing incremental improvements such as having training sessions before a meeting, or as part of your orientation session will contribute to improvements.

If Boards set policies for training, CSOs can make sure it happens. CSOs can make their lives easier by having a serious discussion about competencies and volunteer training with their boards. Perhaps it is time to dust off your volunteer management program (if you have one) and consider how your organization can enhance volunteer leadership training to improve the effectiveness of your organization. Remember the root cause of conflict between CSOs and volunteer leaders can often be traced to the need for training on either side. Increased training in volunteer leadership can lead to organizational success.

*This column features innovation and practical solutions applied to challenges, trends, issues and opportunities for the association community. Column editor Jim Pealow, MBA, CMA, CAE is a consultant and the Association Management Education Program Lead Instructor/Coach for CSAE. He can be reached at [jim@amces.com](mailto:jim@amces.com).*

