Leadership and Change Management

Academy Spotlight Series

Inside this Series

Introduction and Understanding Leadership Roles

This Leadership and Change Management toolkit will be take you through key components of leading an organization, especially through changes. Topics will focus on high level concepts with supplementary information provided for more in-depth training.

The first topic of the series - manage your affiliate similar to a business. Academy Affiliate organizations are independently incorporated and have legal responsibilities similar to a business. One major difference is the affiliate is primarily (or exclusively) managed by volunteers. This is a major responsibility and one that shouldn't be taken lightly. The goal of this toolkit is to give you the tools to know how to run your business, and keep it running long after you have left. The key to success in affiliate management is to create effective leaders and equip them with clear transition and training plans in order to empower them to succeed. Too many times with volunteer led organizations the feeling of being overwhelmed, under prepared, and ineffective creeps into volunteer leaders' minds. This can be remedied with good planning and clear business practices.

The president of an affiliate may be seen as akin to the CEO of a business; this position is in place to oversee, guide activities according to the strategic plan, and help solve major problems. The President role is not to work directly on projects for most of the role. This can be challenging for volunteers who tend to start out at a committee member level where the responsibilities are hands on working on projects. As topics progress through this toolkit, try to focus on empowering yourself as a leader and learning skills to create a solid plan for fellow volunteers to follow.

A powerful first step is creating clear plans/goals including deadlines for each committee tied to the strategic plan, and have each committee report regularly on progress. Templates for annual committee plans and monthly reports can be downloaded.

As always, the Academy is here to help as much as possible. Please feel to contact the Affiliate Relations Team with questions, affiliate@eatright.org.

Role of a Facilitator

Now that you have a sense of how to view your organization as a business, let's talk about the role of volunteer leaders: you are the facilitators. One of the traps many leaders run into is being too hands on with many projects. This is not the role. The role of a project leader (and any facilitator) is to make sure the organizational goals are being met through the projects they are in charge of, and ensuring they are staying on track. Leaders need to take off the "worker bee hat" and don the "manager cap".

To help make this an easier transition, the organization needs to have dedicated volunteers taking the lead on different projects and reporting up to the president or committee chair. Some of these volunteers may fulfill a facilitator's role as well. Projects may have a committee or taskforce working within it requiring several layers of facilitators. With any complicated project, it is important to have a defined communication plan for the facilitators to funnel information to taskforce leaders, to committee chairs, and up to the board.

Volunteer leaders need to head different projects, which may require mostly managing. The president serves as the ultimate facilitator of the affiliate, and should be spending almost all of their time managing committee chairs; in essence, facilitating all affiliate activities. Effective facilitation requires that committee members report activities up to their chair, and the chair reports activity up to the president and the board. Regular communication helps keep projects on track and allows easier trouble shooting.

So does this mean the president or committee chairs never works on projects? No! They are there to guide volunteers through issues and complications that may arise, offer advice when needed, and lend expertise (either their own if it's a topic they know well, or refer the volunteer to another source). To go along with my business analogy, think about your job and when you would approach the CEO (president) of your organization versus going to a manager (committee/taskforce chairs) or even co-worker (committee members). What are the types of situations where you would make the decision on your own versus getting input from someone higher up? It is important to empower volunteers in the same way. A facilitator should outline clearly what volunteer expectations and limitations are, and what resources are available. A facilitator should communicate that they are there if needed, but that the volunteer has their confidence to complete the task at hand.

Acting as a facilitator allows your volunteers to expand roles, think creatively, and ultimately become better volunteer leaders. This defined structure and communication will build support for the organization to ensure volunteers are motivated and willing to fill your ballots each year at election time. Being a facilitator also makes it easier to track all of the current projects within the organization versus getting stuck on one project where the president or committee chair is doing all the hands on work, and risks losing sight of other priorities.

Your affiliate has a lot going on – the president and committee chairs are there to make sure all the parts are working together! Changing from the "doer" to the "leader" can be tough, but it will help the affiliate and your volunteers (not to mention your sanity) in the long run.

Selecting Your Team: Taskforce vs Committee

Now that you've learned about the role of a facilitator, and you know who is going to lead your project or initiative, it's time to determine the team that will work with the facilitator. It is important to establish clear goals and timelines for the taskforce or committee before recruiting members. This ensures you receive qualified candidates who have the proper amount of time to dedicate to the task at hand. The call for volunteers should clearly outline expectations of volunteers along with the goals of the taskforce or committee.

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It is tempting to fill open positions as quickly as possible to ensure the initiative moves forward. While it is important to keep things moving, it is equally as important to make sure the people working on the initiative have the experience and skills necessary to ensure success. If possible, create an application that allows volunteers to answer questions regarding necessary skills that may not be reflected on a resume or CV. Taking the extra step to gather as much pertinent information as possible will ultimately save time, and give your initiatives the best chance at success.

When starting out with a new project, it is best to establish a taskforce initially. A taskforce is organized for a short period of time for a very specific purpose. It works to establish procedures and best practices for new initiatives. As with any new initiative, it is important to monitor and evaluate after an initial implementation to understand if the initiative accomplished the stated goals. At the end of the initiative, the taskforce should compile a complete report for the board with their recommendations. Based on the recommendations, the board can look to form a committee. If the project was a one time, short initiative, the taskforce is able to disband once its goals are reached.

Committees are formed to support long term or permanent initiatives, and base practices on the recommendations of the taskforce if one was in place. The role of the committee is to continue the work and improve the processes to accomplish the committee goals. Regular monitoring, evaluation, and reports to the board should be conducted in order to ensure goals are being met, and that the work continues to align with the strategic plan. As the work progresses, roles within the committee can be further clarified and outlined with position descriptions. Best practice and training documents should be formed to ease the transition between old and new volunteers. Always remember that one of the tasks of every committee is to set the future committee members up for success.

During the work of both committees and taskforces, an important priority is communication with the board on progress and results. This allows the board to understand if resources are being most effectively allocated, strategic plan goals and objectives are being met and an understanding of the overall picture of activities being offered to members.

Leading Volunteers as a Volunteer

After the team is set up, the next step is leading it. First, think about what a new volunteer expects when they start working with your affiliate. Volunteers expect training and support similar to what one would expect in starting a new job. Does your affiliate have these items in place? If not, consider forming a taskforce to explore the need and begin development of resources. If you don't have a position dedicated to volunteer management, consider adding one. This person acts as your affiliate's HR department – soliciting new volunteers on a consistent basis, documenting skills needed versus skills of potential volunteers, recommending matches, and coordinating introductions.

A volunteer coordinator dedicated to constant volunteer recruitment is a vital part of ensuring you can be selective with your candidates. This helps you find the "right" candidate, not just a "warm body". An important component of managing volunteers effectively is making sure the right people are in the right position.

With new volunteers, establish communication early with an orientation of the organization. Defining who the volunteer report tos, who they can talk to if they have issues, what general procedures are in place, and having them sign a conflict of interest form should take top priority. The orientation process contains universal information, and can be conducted by a volunteer coordinator or outgoing volunteer.

After orientation, the focus shifts to position specific training. Even though each volunteer most likely received a position description, this is not an all-encompassing explanation of how to execute their role. Each committee and/or position should also have supporting training documents. Examples include detailed expectations, procedures relevant to the position, best practice documents from past volunteers, contact/vendor lists, forms/documents needed, and a more detailed outline of the committee and everyone's role in it. Establish clear expectations at the beginning of a volunteer's role with the affiliate in order to hold them accountable. By providing resources to meet expectations it will set volunteers up for success.

Setting a volunteer up for success is only the beginning. Your affiliate should have a communication plan in place for committee members to report up to committee chairs, who report up to the board. Delegating roles and responsibilities can be daunting, but if volunteers have clear objectives, direction, and deadlines, volunteers have a higher chance of staying on track.

By establishing informal communication touch points in between organized meetings, you increase the likelihood of catching any missteps before serious consequences can arise. Ongoing communication allows you to identify if a volunteer is unhappy/unsatisfied with their position, or if they are struggling with the workload. Strive to build an environment where volunteers can approach their volunteer leader or the volunteer coordinator with concerns.

As the end of a volunteer term approaches conduct an evaluation of affiliate practices by volunteers should be done. An evaluation should include surveys about general support received by the volunteers, as well as specific conversations about how a volunteer's position can be improved going forward. Utilize current volunteers to update position descriptions and training materials before they roll out of their termed position. Don't let that institutional knowledge get away!

Project Management

Effective project management centers on coordination and organization. The coordination ensures that all programs work towards accomplishing the goals identified in the strategic plan, and that resources are shared across teams if relevant. Organization takes place within each program or project your affiliate is undertaking.

As you review your strategic plan, take the opportunity to evaluate the projects the organization is undertaking. Ask yourself if each project supports fulfillment of the strategic plan. If not, the board needs to evaluate if the project should be adjusted to fit the strategic plan or if the strategic plan needs updated. Every project is developed based on the strategic plan, which directly stems from the organization's mission and vision. It should all flow together.

With any project, it is important to understand what types of steps you need to complete to accomplish the goal of the project. This means each project should start out with a strong set of goals it is intended to accomplish. From there the volunteer leading the project should work with the team to identify the best method for accomplishing the goals. You can accomplish this utilizing tools such as mind maps, outlines, and organizational charts. These tools help to break down goals into objectives, and objectives into tasks for easy delegation.

The items to take into consideration as you're creating a project plan are the basis of your plan: time estimates, budget, resource requirements, schedule, work assignments, goals, and taking into account any uncertainty. Think about the project plan as an outline that integrates all of these details into a clear path and timeline for accomplishing the goals of the project. Once you have this completed a timeline of when each task should be started and finished and who is taking ownership of each task you'll be able to track your progress.

One of the major challenges with project management is timing. Realize that this is a flexible process, especially when projects are run by volunteers. Keep working towards the goal, and adjust plans as needed. Access more in depth training in a project management webinar.

Remember that there is no right way to organize a project – find a system that works for your affiliate. There are many different examples and templates. Pick the tool that helps you organization achieve goals. Templates are available.

Creating Volunteer Buy-In

When implementing change or a new initiative there needs to be buy-in at all levels of the affiliate: the board, volunteers, and members. Creating buy-in is all about effective communication and active engagement. You need to create readiness for change by communicating clearly what the reasons and goals of the change are, engaging with stakeholders to increase involvement, and develop advocates of change.

As with most instances in life, communication is key. By creating an opportunity for people to provide feedback via surveys, focus-groups, or individual conversation you accomplish an important first step of earning buy-in. Ensure that the people giving feedback know their voices were heard, even if they weren't heeded. Clearly thank people for their time and consideration, and outline any changes or adjustments with reasons behind them. If you receive similar suggestions from multiple people, but for whatever reason those suggestions weren't incorporated into the plan, you may choose to address those particular suggestions. Communication about your decisions should include data and support information about why a decision was made.

The method of communicating results will vary depending on how input was received. An email to the membership should include a general overview without going into a lot of specifics. Whereas focus group feedback should include more details and focus on the specific outcomes from the discussion of that small group. Finally, individual conversations should have a follow up conversation if possible.

You may consider leveraging the information gathering stage to develop a pool of people to recruit for volunteers to work on the project. Change usually requires a lot of work. For example, outlining recommended best practices, testing recommendations, collecting data/feedback, synthesizing results, and creating revised best practices. By working with people who want to be active in the process and have an opinion on the project, you as a leader have more time to focus on the big picture and manage the project effectively. When volunteers feel engaged in the process they feel committed to its success. You've created buy-in.

But don't stop there. These new volunteers who believe in the project are your greatest tool for spreading positive messaging. They can serve as ambassadors to other members who may not be as actively involved in the project and may have questions or hesitations about changes being made. Casual conversations between members will help educate those not involved about the goals, vision, and work involved in the project. This is one of the easiest and most effective ways of creating widespread buy-in throughout your membership.

Communicating with and involving affiliate stakeholders early in the change process is the easiest and most effective way to create buy-in.

Be a Mission Driven Organization

When implementing programs or preparing for change, it is important to provide direction for your affiliate's future. Often volunteer led organizations get stuck in going through the motions of what was done in the past as volunteers try to keep their heads above water until their term is done. Creating a culture that focuses on mission driven operations will help break your organization from this rut and facilitate quicker understanding of purpose and goals which leads to more meaningful programs.

The first step on being a mission driven organization is to evaluate the organization's mission and whether it accurately reflects what the leaders want the organization to accomplish. One way to ensure this happens is for the board to collect feedback from members and community organizations on their perceptions and feelings about the affiliate. This feedback is crucial for evaluating and developing your organization's mission and vision. This outreach can also result in sharing resources and achieving overlapping goals and educating outside communities on the role of the RDN.

Once your organization has an accurate mission and vision, the next step is to develop a strategic plan. The strategic plan is a set of concentrated goals used to accomplish the mission statement, and should be the basis of every decision the affiliate makes. Use the strategic planning process as a time to evaluate how your affiliate operates.

- What is the state of the affiliate's finances?
- Are operational procedures working well?
- What type of training and support are volunteers receiving?
- Are there programs the Board should add, stop, or revamp?
- Are their outside organization with which the affiliate should partner?

Take time to concentrate on evaluating the affiliate's programs. Clear, mission driven goals should drive the creation of the strategic plan. The strategic plan is then supported by the affiliate's current programs. If you have a hard time identifying how an affiliate program fits into the strategic plan or how it aligns with the mission, the program may not need to continue. It's common for programs to run their course and be retired. Or, sometimes a program simply needs to be adjusted to better align with the affiliate's overall goals. Don't be afraid to change what the affiliate is doing as long as it's the result of careful analysis and is in the best interest of the organization as a whole.

As you work through evaluating programs, make sure you are monitoring and evaluating how effective programs are at accomplishing their objectives as these objectives should be directly related to the big picture strategic goals of the organization. Is the program living up to its potential, so to speak?

If a program is running well and aligning with the organization's strategic plan and mission, continue to monitor it. Ensure that members continue to express satisfaction with the program and that tangible outcomes are achieved, it applicable. Successful programs continue to be successful when the volunteers involved are motivated and achieving successful results.

Data Collection

An important first step in gathering data is understanding why you are collecting data. The affiliate should establish goals it hopes to achieve from gathering the data. Some examples may be to determine what benefits are most utilized by members, solicit ideas for new member benefits, or determine if the organization's mission and vision are accurate.

After the board establishes goals, it is time to determine two things:

1) How will data be gathered, and
2) What types of questions will be asked to obtain useful data.

If it is decided to use a surveys to collect data, keep in mind that response rates can often be low. Brainstorm creative ways to increase responses such as giveaways, asking board members to send out individualized emails to members they know or promote engagement during life events and on social media.

When determining how to collect data, the affiliate may decide that a survey is the best method, but don't overlook less obvious options such as focus groups and individual interviews. Different segments of people may requirement different communication styles. For instance a survey may be appropriate for members and non-members while a focus group may require a more personalized touched. Individual phone calls to either targeted or randomly selected groups is another great way to collect data. Data collection from outside partner organizations is usually best collected in individual interviews or conversations which lends to building a relationship and specific ideas on how you may work together in the future.

After establishing goals of data collection and determining a plan for how to collect data, the next phase is formatting the questions to spur feedback and conversation. Some tips include:

- Limit questions to only those that are necessary to fulfill the goals.
- Make surveys applicable to respondents by utilizing skip-logic to bypass non-relevant questions.
- When necessary use a "not applicable" or "other" field so that data is not skewed in the instance that proposed answers do not apply.
- Review questions to ensure that they do not ask more than question in one. Respondents may interpret the questions differently.
- Consider the best use of open-ended questions. While it is tempting to keep questions in a quantifiable format, a lot of good information can be gleaned from a well written open ended question. Think about what the question is meant to achieve and word it appropriately.

There are great resources for helping write effective surveys and leading focus groups:

- Qualtrics resources on building surveys – 10 Tips and 4 Common Sense Tips
- Free Management Library's Basics of Conducting Focus Groups
- Alternative brainstorming method – World Café

Decision Making

As new opportunities and ideas present themselves to the affiliate, it is easy to be slowed down by indecision. The board may have a great idea or be presented with interesting opportunities, but as conversation and discussions wind down, making a final decision may feel out reach.

When making decisions, you may get caught up in the thought process of "yes or no" - should the affiliate take on this project, or participate in this event or enter into this partnership? Yes and no questions like this limit your options. Instead, focus on widening your perspective. Start with your focus on the idea or opportunity itself and ask, "Can the affiliate accomplish this project in its current form?" Sometimes the answer will be 'no' due to budgets or other resource constraints. If it is 'no', focus on asking "what is the next best thing the affiliate could be doing?" There may be creative options for altering an existing program, working with a partner organization or potentially promoting an outside option that fills the need you've identified.

Another trap that is easy to fall into is confirmation bias. Conformation bias is the perspective that 'my idea is the best idea', or 'the way we've done things is the best way to do them'. This might not always be the case, so as you look at alternatives from a wider perspective, try to analyze them objectively. It helps to use a form that outlines the idea, includes a list of resources needed and specific ways to implement the idea. This can be easily shared with the entire board. By giving people more information about how something can be accomplished in a different way, you reduce the influence confirmation bias.

The third item to take into consideration when making decisions is the influence of emotions. Sometimes, especially while meeting in a group, an idea pops up and everyone gets very excited about it. Decisions that are made quickly in these situations can lead to poor planning and execution, or a realization half way into the project that there aren't enough resources. It is a good idea to

put a bit of time between the initial discussion and the time a final decision is made. This allows the group to look at the project's aspects such as feasibility, need and alignment with the organization's strategic plan. It also provides a chance to broaden individual's perspective about alternate ways of accomplishing the goal.

The last thing to keep in mind as you are making decisions is that you aren't always going to make the right decision. Be prepared to be wrong, and make a plan in case you are. A popular method is to begin a program on a trial basis such as launching an initiative on a small scale. Create a taskforce to plan how the organization will accomplish the project and determine its success and relevance. From that test, the taskforce may go back and make adjustments if the project worked well or has good potential. Using this method, if the project isn't a success, a lot of time or resources were not invested in it compared to a large scale role out. Use this test evaluation to look for a different way to accomplish the goal.

All in all, decision making is about moving forward in a strategic manner. The board should be comfortable to make recommendations, analyze suggestions critically, think creatively about alternatives, empower a taskforce to move a project forward systematically and objectively evaluate the results. Many times we view failures as bad decision making. Remember that no person and no group is perfect, and bad decisions will be made. It's not about avoiding bad decisions, it's about minimizing the impact and learning from your mistakes. The more you are able to convey this to your board, the more comfortable they will be as a group in decision making.

Implementation

This topic focuses on the implementation of projects. In the decision making process goals and the scope of the project are established. During implementation the work changes to developing a plan for moving the project forward. It can be tempting to jump into a projects with little to no prior planning. By taking the time to create a detailed plan beforehand, you will be more likely to accomplish the project effort in the long run and with less effort.

The first step is reviewing the goal and breaking it down into individual objectives and even more detailed into individual tasks. In this step, you should focus on defining tactics in a granular a level to help you effectively plan how long things will take and ensure all action items are accounted for. For example if the project is developing a new webinar series, the objectives might:

1. Planning topics, speakers, and dates,
2. Soliciting sponsors,
3. Marketing, and
4. Technology and logistics.

Under each of these objectives may be more detailed tasks required to complete each step.

After all of the tasks have been identified, you should group them into similar tasks and estimate how much time it will take for each one. This will allow you to accurately estimate how many volunteers are needed for each step, what the time commitment will be and a detailed position description to use while recruiting the volunteers. Some of the objectives may overlap. For instance, sticking with the webinar example, the logistics may include securing CEU for the event, which would overlap with objective of planning topics, speakers, and dates. Identifying where volunteers may need to work together will increase collaboration and decrease frustration.

One other important point during this step is to identify any additional resources that will be necessary to complete each task. Tasks such as designing and printing materials will require money or require a teleconference lines. Identifying these

resources will help when orienting volunteers to give them an accurate picture of what is available to them to complete their goals.

After tasks have been assigned to volunteer roles, it's time to establish a timeline. First identify the major milestone deadlines such as a launch date. Next look at non-flexible deadlines such as contracts, ordering deadlines and printing due dates. Using these timelines, it becomes easier to work backwards to add in the additional steps in the timeline. Remaining tasks can be filled in to ensure that no one person is over stretched at any certain time and to help with monitoring progress.

Monitoring progress is the final step of implementation. Note that up until now everything revolved around creating a plan. Once the plan is in place, volunteers are empowered to complete their tasks individually. The work is not done for the person leading the project. He or she should have a systemized way for volunteers to report back on progress that they are making towards their assigned tasks to ensure things are staying on track and allows for trouble shooting if necessary. During the planning process make sure there are regular check in dates on the timeline.

Evaluation

As the leadership team works through projects and makes decisions about how to move the affiliate forward, it's important to evaluate along the way to ensure the organization is accomplishing its strategic plan, meeting member needs and achieving stakeholder goals.

When performing evaluations it is important to collect information in a timely manner. The more timely the data is collected the more accurate it will be. The affiliate should create an evaluation plan that serves as a way to collect and analyze data. To start the process determine what information the affiliate wants to collect, how to collect it and when to collect it.

To decide what information to collect clearly articulate what questions the evaluation should answer. As you are developing the methods for collecting feedback, consider what types of quantitative as well as qualitative information will be most helpful such as:

- What progress has been made?
- Were the desired outcomes achieved?
- Do the project results justify the project inputs?
- How has the project improved member experience?

Another benefit of evaluation data is using it when interacting with external stakeholders such as sponsors. Sponsors make decisions for allocating resources based on solid statistics to justify the expenditures. Statistics such as attendance rate, overall satisfaction, likelihood of future attendance, etc. Testimonials are also a great addition to your sponsorship information.

After the affiliate has collected evaluation data from a project, determine a system for utilizing the data so that it is beneficial. The data collected can be used in changing existing programs, deciding if new programs are needed, helping to update strategic plans, and assisting relationships with external stakeholders. This work serves as a basis to keep moving the affiliate forward. Skipping the process of evaluation may mean many of the lessons learned are not implemented to make improvements. Develop a centralized process to share the data with the affiliate leadership team so it is available as volunteers working on their projects.

Evaluations serve as a way to keep a finger on the pulse of current views, opinions, and trends. Keep these things front of mind and the affiliate will be nimbly to capitalize on opportunities.

Additional Resources

Leverage the Governance Management Website to access the Affiliate Manual full of templates and guidelines, Webinar Recordings that dive deeper into topics mentioned in this spotlight and Spotlight Stories from other affiliate organizations.