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Channeling Volunteer Leadership for Maximum Impact

Within Catholic schools, leadership is sought in numerous areas, and the volunteers who take on these key roles can make a substantial addition to the school experience. Yet quite often managing volunteer engagement for maximum positive impact can be a challenge.

The Perfect World

In the perfect world, these volunteers are always absolutely clear about their mandate. Therefore, there is no danger of tensions arising from issues ranging from underperformance to micromanagement. Additionally, in this perfect world, a volunteer's skills and passions would be ideally suited to the

school's current challenges and strategic opportunities. Perfect world volunteers would also always operate effectively as a team, demonstrate integrity and a strong work ethic, and constantly be on the lookout for future leadership. And, perfect volunteers would have so much free time that regardless of their committee assignments, they would be able to aggressively pursue fundraising opportunities too!

The Real World

In the real world, while gifts of time and talent from volunteers have a long and valued history of supporting Catholic schools, contemporary challenges of increasing school needs combined with increasing constraints on available volunteer time often create a volunteer conundrum.

***“God has called you to your ministry.
God entrusts to you his care of the young.”***

St. John Baptist de La Salle

Sometimes school leaders experience frustration with volunteers; raise questions about their dedication; or express annoyance with their hesitation to invite others to support the school. And, conversely, sometimes volunteer leaders experience frustration with staff, quite often due to conflicting understandings with regard to the roles and expectations of volunteer positions. Quite often this disconnect results in volunteers, whether they are board or committee members, sending a message that indicates that they may not be ready, willing or equipped to take on the level of leadership for which they have been recruited and that is needed by the school.

How can these well-intended and devoted individuals be best deployed to bring their considerable talents and passions to the fore?

Leadership Levels

Start by clearly defining leadership levels: What kind of a board, council or committee? What authority does it possess? What determines its role and operations? Who's in charge?

The school's governance model likely dictates a specific type of board, council or committee that works collaboratively with school leadership, with clear parameters regarding scope and authority.

Yet schools may have many groups – advisory, foundation, alumni, athletic, programs, etc. – also working to advance the school. A foundation board may be strictly focused on raising funds in one school, yet in another their job is limited to the allocation of endowment revenue to select initiatives. Some committees

exist to extend the reach of the staff in specific areas such as enrollment, fundraising or technology. The start of a productive volunteer assignment benefits from clarity as to the mandate of any volunteer group so that it can operate in the most useful way possible.

Reverse Engineer

Sometimes a lack of efficacy is a natural byproduct if the school has not clarified the role of this leadership body and defined the expectations of its members. Take a good look at the school, the mission, the vision and the plan to get to that preferred future. With that in mind, what is most needed from these volunteer leaders?

Instead of lamenting what may not be occurring, start with backward planning. If establishing a new board or volunteer body, what would it do? How would it work? What skills are needed? Imagine an ideal volunteer board or committee – one that enables the school to dream more, learn more, do more and become more. Begin with the end in mind, and the path to volunteer members may be seen in an entirely new and more productive light.

Litmus Test

Another way to think about it is this: What would happen if all current volunteers suddenly vanished? They ALL won the lottery and moved to Tahiti.

How would that affect the school?
The experience of students and parents?
What would happen...?

- ▶ Not much.
- ▶ Actually, that would be great and save us a lot of time.

- ▶ Well, there's that one alumnus who's really good.
- ▶ It would be devastating!

It is impossible to imagine any Catholic school surviving without the contributions of its volunteers, and the most effective Catholic schools operate so that leadership groups are empowered to contribute in mission-focused and meaningful ways to a school's success.

Characteristics of Strong Boards and Volunteer Leadership Groups

Use this list for a quick checkup on the health of a board or volunteer leadership group. For example, if significant fundraising is what is needed, it makes no sense to seek to populate a board with a large number of committees OR to be surprised when a member of the buildings and grounds committee doesn't magically turn into a part-time major gift officer. What is most needed at this moment in time? That's the clear mandate, and it should drive focus, identification, enlistment, training and activity.

- ▶ Clear Mandate
- ▶ Specific Goals and Objectives to Meet Current Challenges
- ▶ Membership Committed to Mandate and Appropriate to Tasks/Roles
- ▶ Viable Committee Structure
- ▶ Cultivation of Future Leadership
- ▶ Excellent Communication and Work Ethic
- ▶ Strong Board/Volunteer/Staff Relationships
- ▶ Written Expectations

Speaking of Enlistment...

Many volunteer leadership challenges stem from not having the right people at the table, or having them there without a clear understanding of what they are expected to do. A solid identification and enlistment process avoids that pitfall.

Identify the qualifications and characteristics most needed and then brainstorm potential volunteers. Consider talent, passion, affiliations and the ability to work well with others. Imagine what areas would be best served by the expertise and interests of potential volunteers. When the list is complete, rank potential volunteers by desirability and likely level of interest.

Once a list of potential volunteers is approved for consideration, develop a set of interview questions to ensure each candidate is similarly vetted. Determine who would be the best enlister for each candidate. Prepare each one for the initial contact, meeting and follow-up.

Make sure that if the candidate hesitates about the expectations, he or she is offered another option for participation such as serving as a committee member without full board member status or requirements. For boards, a strong committee structure, populated with non-board members, is a sign of strength, and this approach can be applied to other volunteer leadership groups as well.

Depending on the type of board or leadership body the school is building, this may seem overly orchestrated, but the best volunteers will appreciate this seriousness of intent and bring that level of dedication to their participation.

Expectations

A savvy volunteer candidate will ask about the expectations for participation, so make sure the minimal standards have been established and can be clearly articulated. This might address meeting attendance, committee work, interaction with staff/donors/prospects. It will likely remind volunteers of their role as ambassadors when in public, and the understanding that while healthy and respectful debate of ideas in meetings is welcome, once a decision is made all must speak with one voice. An invitation to attend a meeting can also be an effective way to respond to questions or concerns regarding a particular volunteer opportunity.

What about Funding?

When seeking to identify and enlist volunteers for leadership groups that have fundraising responsibilities, the expectations in this regard vary based on the type of leadership group, board or committee but, where appropriate, can typically include giving (annual, capital, events, bequest) with a stated minimal amount or commensurate amount to be raised each year; fundraising (direct, events, other); and prospecting (identifying, qualifying, initiating).

If introducing a give-or-get mandate for the first time and there is resistance from existing volunteer leaders, consider a grandfather clause where current volunteers start with a smaller initial amount that increases over the next few years, but new members are brought on at the expected level.

*“If your actions
inspire others
to dream more,
learn more,
do more and
become more,
you are a leader.”*

John Quincy Adams

Volunteer Identification

Sometimes the problem isn't inconsistent vetting of candidates but rather, finding any at all. If so, that issue is worthy of investigation. Have all audiences – alumni, current parents, past parents, donors, community leaders, business leaders, local experts in useful fields – been considered? Is transition planning underway or does the school scramble when a replacement is necessary? Are some candidates being ignored? Are those who think outside the box and offer up never-before-tried ideas welcome and encouraged?

Is there anything about the current group that might turn others off – too old, too young, complainers versus zealous advocates? Is there a strong committee structure or succession planning model from which new volunteers will emerge; a plan for cultivating future leadership?

Under the Operational Vitality domain of the *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools*, Standard 11 specifically addresses “... clarity for responsibilities, expectations and accountability.”

See catholicschoolstandards.org for more information about NSBCESS.

Just as student recruitment programs require a strong value proposition and targeted marketing, so too enlistment efforts. Be ready to proactively address what prospective volunteers may be thinking. *Why should I join? Why is this the best use of my time or gifts? Why now?*

It is essential to demonstrate impact – in print, online, in person. The pride that a school's volunteers express in the school, students and fellow volunteers speaks volumes and attracts interest. Meetings that truly engage the best ideas and insight of volunteers, and end with each feeling energized and hopeful, will appeal to those who really do want to contribute and not just listen and nod.

School personnel also need to recognize and accept that although the staff/volunteer relationship is a partnership, there is a need to continually cultivate this audience, like any other important constituency. Astute volunteer leaders, in turn, will demonstrate how much they value and support the administrative leadership.

Formation

With the right people on board, figuratively and literally, the key to ensuring efficacy is the ongoing training and formation provided within regular meetings and even potentially at an annual retreat, depending upon the type of volunteer leadership group.



Meetings – held when they are needed, not merely to stick to a previously set schedule – must not only run efficiently but also allow for participation via video or telephone. Strive for the former; volunteer members who can see and be seen are likely to be more engaged with the matters at hand.

Technological advances and the comfort that now exists in working together regardless of proximity open up new avenues for participation. The fabulous alumnus several states away or the fantastic teacher now retired to the south of France are no longer limited from involvement due to geography. Make sure the remote connections function reliably, that instructions are easy to understand, and that the system is tested before each and every meeting.

“Marvelous news! ...”

... announced the Development Chair. “As you know, we have all pledged to support the annual fund each year and, thus far, only 50 percent of us have made our gifts. That means we have at least another \$30,000 coming our way, and John has the credit card machine here tonight so you can take care of this immediately.”

Annual Retreat

An annual retreat – a key best practice in formation, management and relationship building – is often only thought of as a necessity for a school's governing board. Yet, various volunteer leadership groups can also benefit from this practice as it is also an excellent opportunity to...

- ▶ re-engage the enthusiasm each volunteer member brought when joining;
- ▶ further educate about the charisma that guides the school;
- ▶ focus on the big picture and their role in it;
- ▶ invite each member to recall with reverence not just who we are, but whose we are.

A retreat is a perfect time to take stock and set goals; to look at where the school is, where it is going, and how it will get there. This annual gathering can also be used to offer an escape clause to those who might want or need to bring their membership to an end earlier than the terms of office might dictate. Something like...

- I fully understand the expectations and am delighted to renew my commitment.
- I elect to limit my involvement to ____.
- I choose to conclude my service but will continue to provide my prayerful support.

Accountability

Don't assume volunteers are keeping track of how well they are fulfilling their expectations. Provide overall updates on total performance at each meeting and individual progress reports to thank them for their efforts and encourage further activity.

"It was wonderful to have 15 of our advisory board members attend the Alumni Hall of Fame event."

"We have nine new members in our planned giving society, and two of those are from our Alumni Association."

"Mr. Walker introduced us to the XYZ firm, and they are now offering internships to five students."

But accountability can't be the only goal. Those lending their time, skills, energy, passion and resources to Catholic schools deserve to be inspired. Leaders become more effectual with time, training, gratitude and a deepening understanding of the mission and ministry of Catholic education.

Regardless of the areas in which volunteer leadership groups operate, the hope is that all members will embrace the role of ambassador for their Catholic school. Toward that end, don't assume they automatically know how to do this.

- ▶ Address the art and science of strategic conversations.
- ▶ Continually present mission moments that reveal the school's special and distinctive characteristics.

Catholic education is one of the most powerful forces on earth for improving the common good, and that must be reinforced again, and again, and again.

- ▶ Show volunteers how to use casual encounters to promote the school.
- ▶ Regularly share news about accomplishments while also illustrating how to spread the good word.

Help them become the narrators of the school's story. Provide the training necessary to make the fulfillment of their stated expectations comfortable and rewarding.

Remind all those entrusted with volunteer leadership roles about the extraordinary impact the Catholic school has on the lives of the students, the workplaces they will one day enter, the families they will one day create, and the churches and community organizations they will one day join.

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Celebrate!

Volunteer boards, committees, councils, organizations or associations are dynamic and ever-changing, ideally in ways that best serve a Catholic school's students and families. While encouraging volunteer leaders to become more impactful, remember to celebrate the many successes along the way. The collective efforts of talented school personnel and dedicated volunteer leadership make possible the miracles that occur – everyday – in classrooms, hallways, chapel, and on fields and playgrounds.



About the author ...

Mary J. Foley Managing Director

Mary J. Foley brings 35+ years of experience to the not-for-profit world and offers a wealth of strategic leadership skills and insights. A Catholic school graduate and parent, Mary is a zealous advocate for the mission and ministry of Catholic education. She has worked with hundreds of not-for-profits, internally as a director of development, at the board level, and through a wide variety of consulting engagements.

She joined CBS in 2017 as Managing Director of Catholic School Management and Mission Advancement. Mary is a lead presenter for Catholic School Management and speaks nationally with NCEA, NCDC, RCRI and other professional development organizations.



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