

# Connections

YOUR INFORMATION DESTINATION



## IN THIS ISSUE

### Your executive director is leaving. Now what?

by Jim Klingle



One of the reasons for public fascination with the recent Hollywood movie “Snakes on the Plane” is that the title combines two common phobias: air travel and snakes. For voluntary sector boards, a movie title that would cause a similar reaction is “Your Executive Director is Leaving. Now What?”

Unfortunately for voluntary sector boards, the departure of an executive director is not a case of “if” but rather “when”. Saunders (2004) in “Passion and Commitment Under Stress: Human Resource Issues in Canada’s Non-Profit Sector-A Synthesis Report” notes that in the Canadian voluntary sector nearly 39 percent of employees were 45 years of age or older in 1999 (p. 21). Most executive directors will be in this age group. As such, many are now starting to retire or will certainly do so in the next 10 years. Given

Alberta’s labour shortages across all sectors of the economy, boards should also expect that executive directors will also leave to lead other voluntary sector organizations or pursue other career options in the for-profit or public sectors.

In January 2005, as a chair of a voluntary sector board, I heard our executive director utter the fateful words, “I have decided to retire in six months”. Had I known about Weisman and Goldbaum’s (2004) book “Losing Your Executive Director Without Losing Your Way”, I would have bought and read it that day (see a review of the book in this issue of the RCVO newsletter). Happily, the board agreed on a response that Weisman and Goldbaum identify as one of the best ways to assure a well-coordinated executive director transition: strike an ad hoc Transition Committee. Membership on the committee consisted of three board members, including myself as board chair, and the executive director.

In the remainder of this article, I will:

- Discuss how our Transition Committee came to recommend the hiring of an interim executive director
- Describe the process the Committee undertook over a six

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*Compromise, if not the spice of life, is its solidity. It is what makes nations great and marriages strong.*

*Phyllis McGinley*

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month period that resulted in the hiring of an interim executive, draw upon advice from Weisman and Goldbaum's book; and

- Suggest how to further enhance the effectiveness of a Transition Committee in the hiring of an interim executive director.

1. **Develop Transition Committee Terms of Reference.** The first responsibility of the Transition Committee was to prepare a committee terms of reference for review and approval by the board. Committee members prepared a draft terms of reference that was approved by the Board.

The Committee's key areas of responsibility were to:

- Discuss and recommend to the Board whether to hire an interim executive director or permanent one;
- Review and revise the executive director's job description;
- Plan and implement an executive director search process;
- Organize and conduct interviews with potential candidates;
- Recommend a candidate for Board decision; and
- Maintain regular communication links with staff.

2. **Decide on whether to the hire an interim executive director or permanent one.** After discussions among Transition Committee members, it recommended to the Board at the February meeting that an interim executive director be recruited. Weisman and Goldbaum (2004) note that the use of an interim



leader is commonly used in religious organizations when an interim minister is assigned after a minister leaves a posting. The interim minister's role is to help church members through inevitable feelings of loss of their former minister and assist the congregation to prepare to adjust to a new minister's style (pg. 49).

According to Weisman and Goldbaum (2004), "An interim ED can provide a bridge between the previous executive and the next, helping the Board, staff, and other stakeholders adjust to the fact that the previous ED is no longer there. The interim leader can prepare the organization for changes that will occur with the new leadership and play an important role in demonstrating that change can provide new opportunities for the organization." (p. 47)

Several other considerations guided the Transition Committee's recommendation and the Board's subsequent approval to proceed with hiring an interim executive director.

These were:

- Given the long (20+ years) tenure of the executive director, the Transition Committee members believed that time was needed for staff to adjust to the departure of their longstanding executive director;
  - There was a desire by the Board and the Transition Committee to have time to create and implement the hiring process for a permanent executive director; and
  - None of the organization's managers indicated an interest in taking on the executive director role on a permanent basis.
3. **Review and revise the executive director's job description.** Over a two-month period between February and March 2005, the Transition Committee reviewed the executive director's job description. Following that review, two new job descriptions were created: one for an interim

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executive director and another for the permanent executive director position to be recruited at a later date. Weisman and Goldbaum (2004) define the general roles and responsibilities of the interim executive director as:

- Provide oversight and management of the organization's operations, including protection of the organization's capital assets.
- Ensure the stability and morale of the staff.
- Maintain lines of communication with key stakeholders, assuring funders, consumers and others that the agency is in experienced hands.
- Prepare the organization for the next ED.
- Assume other duties as dictated by the organization's needs. (p. 49-50)

#### 4. Determine the qualifications of the interim executive director.

During March 2005, the Transition Committee defined the qualifications it was seeking from a potential interim executive director. Weisman and Goldbaum (2004) offer the following helpful list of potential qualifications:

- At least five years' experience as a successful ED with a nonprofit organization.
- Specific expertise to meet the immediate challenges faced by the organization.
- Expertise in conducting institutional audits, preparing plans of correction, and implementing the plans.
- The ability to be a change agent, and the personality to implement change and accept

the role of lightning rod for resistance to change.

- A working understanding of the chain of command.
- No desire to be the organization's permanent ED.
- The ability to commit to at least a four-to-six month assignment. (p. 63)

Other items that the Transition Committee discussed and finalized (with board approval) in preparing to recruit an interim executive director included:

- Level of compensation (pay and benefits)
- Reporting relationships
- Supervisory relationships
- Term of appointment



- #### 5. Recruit the interim executive director.
- During April 2005, the Transition Committee undertook the process of recruiting an interim executive director. Given the level of qualifications and experience required to act as an interim executive director, it should come as no surprise that such individuals are rare. One of the best ways to identify potential interim executive directors is by drawing upon the current executive director's professional contacts. One of these individuals may be interested in taking on an interim executive director role or know someone with the skills and availability to do so. It was through these networks that the Transition Committee identified

two possible candidates to interview for the interim executive director position.

While each organization will have its own specific interview questions to ask prospective interim executive director candidates, Weisman and Goldbaum (2004) offer a list of possible questions to ask an external candidate for the position. Some of these include:

- Have you been an interim ED before?
- What did you enjoy about being an interim ED?
- What did you find challenging about being an interim ED?
- Why do you prefer being an interim ED to taking a permanent ED position?

Following interviews, the Transition Committee selected a potential interim executive director candidate, conducted a reference check, and made its hiring recommendation to the Board at the April board meeting. Following the board meeting, the Board Chair phoned and formally offered the candidate the position of interim executive director. The candidate accepted the position.

#### 6. Contracting and orienting the interim executive director.

Following the acceptance of the contract offer to the interim executive director, a draft contract was developed in May by the Transition Committee members, reviewed and approved by the Board and the interim executive director, and signed off by the Board Chair and interim executive director. In mid-May, the interim executive director was formally introduced, first to staff, and then to partners, funders, and other stakeholder organizations.

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While contract terms for an interim executive director vary depending on the organization, Weisman and Goldbaum (2004) suggest such a contract should include:

- Terms of engagement (including start and end dates as well as a clause that extends the contract on a month-to-month basis).
- A detailed listing of expectations and role of interim ED.
- A confidentiality clause ensuring that all information obtained during the interim's tenure will be held in confidence.
- Indemnification of liability.
- Cancellation clause.
- Compensation agreement on base pay.
- Agreement to reimbursement of any other expenses related to the job (mileage, lodging, meals, and so on).
- Any other matters the two parties want to include (p. 68).

7. **Orientation of the interim executive director.** Since the organization's current executive director was available until the end of June 2005, there was approximately a month to orient the interim executive director. A series of one-half day meetings were arranged between these two individuals in which a thorough orientation was provided. At the end of June, the organization's executive director was honored and officially retired. The interim executive director undertook the leadership of the organization in July 2005.

### **Suggestions for Further Enhancing the Use of a Transition Committee and Interim Executive Director**

- **Expand the numbers and membership of the Transition Committee.** The timeframe for the Transition Committee, when including the hiring of a permanent executive director, could be as long as eight to 12 months. During this time, boards often can experience changes in membership, resulting in the loss of individuals on the Transition Committee. For this reason, it is recommended that board alternates be designated in the event a Transition Committee member is unable to serve.



- **Include someone on the Transition Committee with knowledge, training, and expertise in human resources.** Transition Committee members hiring both an interim and permanent executive director often need the advice and perspectives of a human resource professional. Someone with this expertise will likely need to be recruited outside the organization but Weisman and Goldbaum (2004) suggest it would be a valuable addition throughout the process (pg. 44).
- **Include the executive director in the recruitment and hiring of the interim executive director.** With an increasing number of executive directors likely to retire from their voluntary sector organizations, there is an ideal

opportunity to utilize her/his knowledge and expertise in hiring the interim executive director. Because the interim executive director is a temporary position, the retiring executive director is less likely to feel the need to hire someone in her/his own image with a similar management style and approach.

- **Involve the interim executive director in the search for the permanent executive director.** Since an interim executive director is not interested in the permanent executive director position, it is well worth inviting the interim executive director to take part in the recruitment of the permanent executive director. According to Weisman and Goldbaum (2004), the interim executive director brings a fresh perspective about the organization and the job that could greatly benefit the recruitment process.

In summary, the use of a Board Transition Committee to undertake the process of recruiting a voluntary sector organization's executive director, interim or permanent, is a highly efficient, effective use of Board resources. As outlined in this article, the hiring of an interim executive director provides the organization 'breathing space' in which to make the transition from the former executive director, enables the Board the luxury of time for reflection and planning for the new executive director role, and creates the opportunity to recruit to the permanent executive director position in a thoughtful, intentional way. □

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## More helpful information on the RCVO website

by Lydia Baker

Thanks to funding from TransCanada Pipelines, we have transformed our former FAQ web page into the new “Useful Information” destination on our website.

Designed to provide quick answers and practical advice on a variety of voluntary sector topics, “Useful Information” content includes frequently asked questions and how-to guides, as well as information bulletins from Alberta Government’s Board Development Program. This new area of our website also includes newly-acquired, TransCanada-funded articles to assist you in your day-to-day search for quick information and advice.

Below is a sampling of the topics you will find on the “Useful Information” page (full text available online):

### **Volunteer role design: the key to your volunteer program by Cheryl Humphrey-Pratt**

*Designing roles is important because:*

*It allows us to look at the needs and mandate of the organization and ensure that roles we are creating or designing help the organization achieve its goals.*

*It allows us to make the best use of our resources. Volunteer time is at a premium. Nobody wants to spend their time working at a task or job that is not interesting, enjoyable, fulfilling, or that is not helping the organization achieve its goals. We know that the number one reason why people volunteer is that they believe in the cause (Canada Survey of Giving, Volunteering and Participating, 2000; www.givingandvolunteering.ca). If their volunteer efforts are not contributing to the cause, they will*



*generally not be motivated to continue their involvement.*

After defining and discussing the importance of role design, this article offers special considerations involved in volunteer role design, such as trends in the sector and the climate of your organization, along with clear guidelines for creating position descriptions.

### **Strategic planning in voluntary sector organizations by Jim Klingle**

*Strategic planning is the process by which an organization creates a clear, compelling picture of its future and then puts in place the necessary procedures and actions to achieve this future.*

*Strategic planning examines an organization’s external and internal environment. It incorporates these findings into a process that affirms the current and future directions of the organization. A strategic plan sets multi-year goals, most often with a three-year horizon. In a voluntary sector organization, the board, meeting together with organizational management staff, often develops the strategic plan.*

In this piece, Klingle identifies the critical elements of an organization’s strategic plan, why it should be done,

when—as well as when not—a strategic plan should be made and who should be involved.

### **Reflections on partnerships by Wendy M. Doughty**

*In times of increasing accountability, partnerships are viewed as a way to maximize effectiveness and efficiency, while maximizing the use of resources. For some, it appears that the move to partnership has been “laid on” by external forces. Yet partnerships, when they are well-planned and created within a spirit of goodwill, can result in new ways of working and new programs/services, and rejuvenate partnering agencies/organizations.*

Wendy M. Doughty, in this article, offers how-to advice on creating, building and maintaining partnerships. She also discusses the challenges, such as the time and energy it takes to implement the partnership and the efforts involved in maintaining independence.

Be sure to visit rcvo.org soon to access the above resources on the “Useful Information” page—and keep watching as new material is added! ☐

*Lydia Baker is RCVO’s Web Coordinator and Special Collections Cataloguer.*

# Updates

## **Executive Leadership for Nonprofit Organizations**

*(Formerly the Voluntary Sector Management Program)*

The Voluntary Sector Management Program was discontinued as of June 30, 2006. In its place, Grant MacEwan College, a pioneer in Canadian nonprofit management training, is responding to a need to train future leaders of the voluntary sector. High turnover of senior staff in the nonprofit sector is anticipated over the next decade, leaving a vacuum of qualified staff. MacEwan is meeting this need head-on by developing a new post-diploma certificate that will focus on leadership competencies defined by the National Learning Initiative for the Voluntary Sector (NLI).

The *Executive Leadership for Nonprofit Organizations* post-diploma certificate program will launch in the fall of 2007. This two-year program will be offered on a part-time basis, combining face-to-face learning with online course delivery. The program targets current staff of nonprofit organizations who are, or wish to become, executive directors in this field. The program integrates learning with the workplace, as assignments and coursework can often be completed through utilization of your current work projects.

More complete information on the program will be available in the fall of 2006. Please check [www.macewan.ca/leadership](http://www.macewan.ca/leadership) or call 780-497-5268 for future updates.

## **RCVO Continues to Grow!**

Fall has descended on us with new scheduled events, new and exciting research materials, new clients, new "On the Road" destinations and even new staff. As we all know, it is a busy time for organizations and equally so for the RCVO.

### **So What Series and Other Workshops**

Our staff is looking forward to presenting our "So What Series" here at Grant MacEwan College. We will also be offering four fundraising workshops throughout the year, both here and in two other locations in Alberta. As in past years, we will be hosting several of the Board Development Program's board workshops in the fall and in the spring. It is always a rewarding experience for us to host the 'Charity's Wills Week' presentation in conjunction with the Edmonton Community Foundation. We are also very pleased to host one of the Insurance Toolkit presentations presented through Volunteer Alberta and the Edmonton Chamber of Voluntary Organizations. See page 7 for a listing of these events or visit our website at [www.rcvo.org](http://www.rcvo.org).

### **The Lois Hole Collection**

The RCVO is developing its Lois Hole collection of materials. Through generous funding from The Muttart Foundation in honour of Lois Hole, we will be looking to order and make available more books and resources. The collection will grow on our own shelves, on the shelves of Grant MacEwan College's Learning Resources Centre and in our "On

the Road" collection. If you have any requests for purchase, please contact us as we are constantly looking for new titles and publishers.

### **Service With a Smile!**

RCVO's service to the public continues to grow as we receive requests for information by phone (780-497-5616 or toll free 877-897-5616) and by e-mail ([rcvo@macewan.ca](mailto:rcvo@macewan.ca)). The questions vary from "how do you start a nonprofit organization" to "what do I need to know to start a capital campaign" to "what should we include in our board policies". Certainly, if you have a question please contact the RCVO and our experienced staff will be happy to respond. When questions are beyond our scope, we'll endeavor to refer you to other good resources.

RCVO users find coming in to research for funding a great benefit. The RCVO subscribes to Imagine Canada's Funding Sources database and Prospect Research Online. With the understanding that not all organizations can afford to purchase these databases, we have an agreement with the providers that our location may be used to access the information. Remember to book your time by calling the RCVO. When we are On the Road, we can offer this service in other communities but otherwise it is an onsite offering.

Please give us a call, share your questions with the RCVO staff and we will do our very best to help you out.

# Learning Opportunities

## **Fundraising Success: Where to Start and How to Build It!**

**Saturday, October 21, 2006**

**Canmore, AB**

**Saturday, November 25, 2006**

**Grant MacEwan College,  
10700-104 Ave., Edmonton, AB**

Achieving success takes resources! Are you raising funds in a small organization; or starting a new fund development program; or just learning the basics? Then this workshop is for you. Come and explore the answers to key questions on regulations, the people needed on your development team, the right tools to use, and how to compete with high profile campaigns.

This workshop was created with the support of TransCanada Pipelines to create awareness, build confidence and provide resource materials and sources for further learning with regards to fundraising programs.

For details check out our website at [www.rcvo.org](http://www.rcvo.org) or call 780-497-5616.

## **Strengthening Volunteer Boards**

**Saturday, October 28, 2006**

**9:00 a.m. - 4:00 p.m., Room 5-137**

**Grant MacEwan College,  
10700-104 Ave., Edmonton, AB**

As a board member of a nonprofit organization, have you ever wondered ...

- What are my legal and ethical responsibilities?
- What role do I play in governing our organization?
- How can our board organize its work fairly and efficiently to avoid volunteer and staff burnout?
- How can we develop policies that will help us make consistent decisions?

- How can we encourage teamwork between the board and staff?

If you're a new board member wanting to learn more about your role, or an experienced board member wishing to enhance your skills and work effectively as a team member, this workshop is for you. Workshop content will focus on incorporated and nonprofit organizations and is not appropriate for advisory boards. Limit of three board members per organization please.

To register call 780-497-4780 or [voluntarysectorevents@macewan.ca](mailto:voluntarysectorevents@macewan.ca).

## **WillPower Wills Week, the Charities Edition**

**Wednesday, November 8, 2006**

**3:00-5:00 p.m., Room 5-142,**

**Grant MacEwan College,  
10700-104 Ave., Edmonton, AB**

The 2006 session will focus on estate and will planning for the individual. Not-for-profit organizations often receive generous contributions from donors through wills and estates, but many of the employees in these same organizations have not taken time to consult with a professional advisor and prepare a valid, up-to-date will, a will that will ensure that their own estate and philanthropic wishes are realized.

WillPower Wills Week, the Charities Edition, conducted by Karen Platten, an Estate Practice Leader with McLennan Ross will explain:

- Why wills, enduring power of attorney and personal directive are so important for you
- What these essential documents contain
- Where to get help

- What not to trust on the Internet or in kits

Seating is limited. Please RSVP by calling 780-423-4956. For more information, visit the Edmonton Community Foundation website at [www.ecfoundation.org](http://www.ecfoundation.org).

## **“So What? Linking Research & Practice in the Voluntary Sector”**

### **2006/2007 Series**

In recent years there has been a massive increase in the quality and volume of applied research regarding best practices in managing and leading nonprofit organizations. Grant MacEwan College, in conjunction with the Resource Centre for Voluntary Organizations (RCVO) and TransCanada, is once again offering a series of breakfast discussions, called the “So What?” series, aimed at increasing knowledge and dialogue about applied research with leaders of community organizations.

### **First Session (Nadine Maillot)**

**November 15, 2006**

**8:30-10:30 a.m., Room 6-313H**

**Grant MacEwan College,  
10700-104 Ave., Edmonton, AB**

Join Nadine Maillot November 15 for her presentation: ***Benchmark for Success—An introduction to the new version of the Canadian Code for Volunteer Involvement.***

Since its introduction in 2000, the Canadian Code for Volunteer Involvement (CCVI) has become known as the voluntary sector benchmark for volunteer involvement. The CCVI is a roadmap for voluntary organizations of all sizes to effectively involve

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## Top ten strategies for retaining today's volunteers

by Reva Cooper

*This article is based on a presentation by Reva Cooper on behalf of the Ontario Community Support Association at the ATCO Community Symposium on Volunteer Management. Approximately 200 people attended the event, which took place during April 2006 in Vegreville and Trochu, Alberta.*

It is more difficult to recruit and retain volunteers than in the past. Volunteers have limited time and a multitude of choices about where and how to contribute to their communities. Vibrant volunteer-involving organizations have a plan for volunteer resource management, and a professional approach to retaining volunteers. For voluntary organizations to continue to accomplish crucial community work through the efforts of volunteers, organizations need strategies that ensure ongoing value for both the volunteer and the organization. Management guru Peter Drucker says "strategy converts a non-profit institution's mission and objectives into performance". These ten strategies are designed to help organizations gain a strategic advantage to maintain the commitment, enthusiasm and energy of volunteers.

### 1. Understand and meet peoples' needs

By identifying why people started volunteering and what needs they hope to meet, organizations can make sure that volunteers are in roles that will motivate and engage them. Knowing why volunteers stay involved helps to ensure that the opportunities for participation and available supports will maintain their commitment. Understanding why volunteers leave may identify problem

areas that need to be changed. Methods to gather information on volunteer motivation during the placement include occasional satisfaction surveys, specific questions at volunteer evaluations, and exit interviews.

### 2. Be a matchmaker

Matchmaking involves matching the interests, motivations, skills, and time availability of individual volunteers with specific mission-focused roles in your organization. A formal process for matching includes position descriptions, application forms, interviews, and screening mechanisms such as reference checks, where appropriate. Being available to supervise and support volunteers, particularly early in the placement, is a way to identify if the match is working and ensures that both the volunteer and the organization are benefiting from the placement. Determine what action to take if a match isn't working.

### 3. Set people up for success

Provide orientation to the organization and train people so that they have the skills, knowledge and confidence to do a good job. Sharing predetermined

outcomes, and measuring volunteer performance clarifies position goals and helps volunteers to see the impact of their work.

Volunteers appreciate feedback in the form of sincere praise and honest, constructive criticism. Ensure needed resources are available to carry out the assigned volunteer duties and responsibilities including sufficient space, equipment, ongoing training, and reimbursement for out-of-pocket expenses. Volunteers need a support system in order to maximize their potential, and someone who is available when they have questions, concerns, ideas, or suggestions.

### 4. See volunteers as customers

Your organization cannot carry out its mandate and programs without them. A 1998 UPS Foundation study found that, like customers buying a product, volunteers make decisions to stay or leave based on their experiences with the organization. Volunteers "talked with their feet". They left because of poor volunteer management practices including; the charity was not well managed, tasks were unclear,



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and volunteer time or talents were not well used ([www.community.ups.com](http://www.community.ups.com)). When volunteers are treated like valued customers, their commitment and loyalty will increase, they will recruit others, and they will help accomplish core strategic objectives.



**5. Designate a volunteer resources professional**

A designated Volunteer Resources Professional enables organizations to: meet key goals, generate community awareness and support, develop partnerships, and sustain voluntary action. Whether paid or unpaid, full-time or part-time, having one person responsible for overseeing the recruitment and retention of volunteers is critical. Like paid human resource management, this person must have the skills, knowledge, time, focus, training and support to do a good job. From a customer-service perspective, organizational infrastructure is the most common cited form of support provided to volunteers.

**6. Foster a positive organizational climate**

The organizational climate expresses shared assumptions, values and beliefs about itself, its members, its paid and unpaid staff, and its clients/participants. High performance and commitment result when there is

a spirit of teamwork and trust, a feeling of mutual respect and support with individual freedom and flexibility, open communication, and clear methods for addressing and resolving conflicts. Building on a shared vision and common goals, and ensuring that volunteers are “in the loop” about what is happening in the organization, also contribute to a climate that supports volunteer retention.

**7. Welcome diversity**

Diversity is about welcoming a broad range of people, and valuing every volunteer. Be open and accepting of new ideas, new ways of doing things, and respect a wide range of opinions. Incorporating diversity in all aspects of organizational operations, including board composition, recruitment practices, and communication methods will enrich and expand retention opportunities.

**8. Be flexible**

People’s lives are in constant change today; they are working harder than ever, and often feel like there is not enough time for family and friends. The opportunity is that people still want to contribute and make a difference as volunteers. We need to be sensitive to changes that impact peoples’ ability to be effective as volunteers, and help them to make time and arrangements for their priorities. We also need to ensure that our volunteer positions reflect the time, interests, and motivations of today’s volunteer. Being flexible about when, where and how the work gets done will help people fit volunteering into their busy lives. Provide individualized opportunities for changes in degree and type of commitment including breaks and sabbaticals, or chances for advancement and personal growth.

**9. Don’t burn people out**

In Alberta, 25% of volunteers give 72% of all volunteer hours (National Survey of Giving, Volunteering and Participating, 2000, [www.givingandvolunteering.ca](http://www.givingandvolunteering.ca)). As was identified at the ATGO Symposium, particularly in rural areas, the STP’s (Same Ten People) are often doing the lions’ share of the work and are in danger of fizzling out. Help people to identify and deal with causes of stress. Encourage volunteers to be aware of their limits, and match their workload and goals accordingly. Recruit new people, and delegate to others, providing ongoing training and support so that they can help share the load.

**10. Recognize contributions**

One can never overestimate the power of a “thank you” as a retention strategy. People are committed and will continue to work hard if they feel that their work is valued and that they are making a difference. Take time to celebrate accomplishments, to congratulate people for a job well done and to share successes or positive changes that have come about as a result of volunteer efforts. Identify and build on methods to recognize and reward volunteers both formally and informally throughout the year.

And, if you are a volunteer leader or a leader of volunteers, or both, pat yourself on the back for a job well done. Your contributions and continued commitment make our communities stronger, safer, healthier and fairer places to live. ☐

*Reva is a consultant, trainer, and needs assessor who customizes workshops aimed at maximizing volunteer engagement, and can be reached at [2ofus@sentex.net](mailto:2ofus@sentex.net).*

## RCVO On the Road



Picture a van, loaded with almost every imaginable resource related to the voluntary sector, traveling along Alberta's highways. It's RCVO On the Road—an innovative and dynamic program that carries our resources and expertise to voluntary sector events throughout Alberta. This traveling collection includes resource materials such as timely articles, books and journals pertaining to nonprofit organization management, fund development, volunteer program management, board leadership and governance, and voluntary sector issues. Where Internet service is available, clients can access our licensed databases to look for funding sources. Thanks to The Muttart Foundation and TransCanada, this program is provided free of charge to all organizations or individuals associated with the nonprofit voluntary sector in Alberta.

**Please consider inviting us to enhance your conference or event, or as a stand-alone event in your community. If you are interested in this program visiting your community, your responsibilities would be:**

1. To advertise RCVO's visit to other nonprofit organizations in your community. We can give you a list of types of organizations you might want to invite.
2. To provide an accessible (wheelchair) facility/room large enough to accommodate at least seven large display tables for our files, books, brochures and order forms.
3. To provide a photocopier to make copies of our original documents. Photocopying costs and receipts for photocopying costs are at your discretion. Two to three packages of paper are normally required.
4. To assign a volunteer or staff member to assist us with setup and take down of our display, and remain on site as support during our site visit.
5. If possible, to provide us with internet access.

We are also able to offer workshops with the support of TransCanada Pipelines. We offer a full-day session entitled Fundraising Success: Where to Start & How to Build It. This session addresses organizational readiness, the fund development team, how to work with volunteers, fundraising basic tools and strategies, recordkeeping, planning and evaluation. We are also developing one-hour workshops such as Tapping into Volunteer Motivation, Risk Management, Volunteer Recognition,

Volunteer Recruitment and Designing Volunteer Jobs. In order to ensure success with these workshops, we need a commitment that at least 20 people will attend the session. You could charge a small fee to cover your costs and provide lunch for the day.

Please visit our website [www.rcvo.org](http://www.rcvo.org) to get more information on what we can offer to the organizations and groups that you work with.

In the fall of 2006, the On the Road program is booked to visit Calgary on September 29 & 30 at the Alberta Museums Association's Leadership on the Edge...Conference, La Crete on October 5th in partnership with the Northern Lights Health Region Volunteer Services, Canmore on October 21st in partnership with the Canmore Museum and Geoscience Centre (also presenting Fund Raising Success Workshop), and Grande Prairie on November 15th at the Giving From the Heart Conference.

For information or to register at these events, please go to the "OTR" tab on our website ([www.rcvo.org](http://www.rcvo.org)) and scroll down to our schedule. We would be willing to bring our books, articles and databases to your area! Contact Lindsay McWhirter, RCVO's new On the Road Coordinator, for more information. E-mail [mcwhirterl@macewan.ca](mailto:mcwhirterl@macewan.ca), direct line 780-633-3679 or toll free in Alberta 877-897-5616. ☐

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volunteers as part of their human resources team. Join us to hear about the research and process that was used in developing this evolved version of the code and to explore the ways you can use it to strengthen and position volunteer involvement in your organization.

Watch for further information on the "So What?" series on our website at

[www.rcvo.org](http://www.rcvo.org) (events), or call the RCVO Event Hotline at 780-497-4780.

### Insurance Toolkit

Seminars are focused on increasing your organization's knowledge of the insurance industry, its products, and answers to your questions about adequate coverage.

Led by an insurance professional who understands the needs of the voluntary sector, seminars offer a hands-on learning experience that reading a workbook or publication simply cannot offer.

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## Character in fundraising - principle number four: direction

by Roger Breault



This article is the fourth of series on the subject of seven character traits to develop to become an effective, productive and authentic fundraiser. It is written with the intent to fill a sizable gap in the formation and education of those who want to be true fundraising professionals.

“Quo vadis?” “Où vas-tu?” Where are you going? It’s a question that rings in some of us a lot of the time; for all of us it rattles in our minds at least some of the time.

The question of our life and its direction must resonate at least occasionally. Where are you going with your fundraising? What’s your goal? How do you get there? What’s your starting point? This last question may be the easiest to answer. Your starting point is always the here and now. It demands reflection nonetheless.

Direction in life, whether it’s the pursuit of professional or personal goals, always involves a sense of values. What do you value? The Institute for Global Ethics, a world-wide think tank that studied several cultures across major religions and different continents, found a common denominator of five pillars/values that humans agree upon as being most important: Honesty, Respect, Responsibility, Fairness and Compassion. Of course we espouse these values. What about our actions, our paths, our strategies, our feelings? Do they reflect this bearing?

Begin with the end in mind. This golden maxim is what drives every great mind and changes our world daily. When our sense of direction and accomplishment is founded in the five universal values and it includes a plan that propels our action, we cannot help but achieve at a higher level. Where we are going, what we do, how we get there and the results of our work are focused; what’s more, we will feel better about ourselves.

Much of our sense of direction in the fundraising business is couched in hollow words like objectives, strategies, and plans. What these “work-words” fail to convey to us as we move ahead in our charitable work and our careers is that we are marching to the tune of a different drummer. Our drummer is inherently honest, respectful, responsible, fair and compassionate isn’t she? The significance of our profession is that it embraces these values as the primary motivating force behind everything that we do. It delivers a profound sense of appreciation; it eases the burden of the day-to-day drudgery of some aspects of our work. Whether you are a professional or a volunteer, as a fundraiser you can take pride that you are contributing to the emancipation of humanity through directed efforts to express compassion, to restore dignity and respect and to facilitate fairness. This is the true starting place of our sense of direction.

On the practical side, it’s usually useful to set goals daily. Keep them front and center to ensure that you are pursuing your sense of direction. However mundane at times, your work will appear easier and more meaningful if it functions in aim of where you are going. Why? Because when you look at it in this way, you are concentrating on how to make things happen rather than “if” things happen. A sense of direction enables you to become resolute in what you

do and it motivates to accomplish more and it generates more.

The three previous character traits we have reviewed to-date in this series, intelligence, fervency and self-confidence burgeon when they are accompanied by a keen sense of direction. Without it, they are empty promises.

Let’s go back to the beginning. Let’s question fundamentals as Socrates wisely asks us. “Quo vadis?” “Where are you going? What’s the purpose of your life, what practical steps are you taking to get closer to these goals? On what values are these goals based?”

Some wise person said: “There is no finish line”. It’s true. Once you have achieved a plateau of accomplishment, there will always be a loftier goal towards which we can strive. You can be comforted by the fact that when your sense of direction is founded on noble values and that you do your very best to realize aspirations through your fundraising, your fulfillment will grow and you will feel ennobled about what you are doing. Having a keen and clear sense of direction is essential to being a successful fundraiser.

### A Short List of Selected Readings on the Subject of Direction in Fundraising

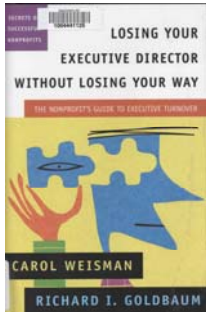
Covey, Steven, *Seven Habits of Highly Effective People*

Gross, Ronald, *Socrates’ Way*

Kidder, Rushworth M. *How Good People Make Tough Choices, Resolving the Dilemmas of Ethical Living*

McCormack, Mark *Giving it 110%* ☐

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## BOOK REVIEW

### Losing Your Executive Director Without Losing Your Way

by Carole Weisman and Richard I. Goldbaum (HD 62.6.W46 2004)

To borrow this book from Grant MacEwan's Learning Resources Centre, contact Michelle Bezenar, Interlibrary Loans, phone 780-497-5857, e-mail: [bezenarm@macewan.ca](mailto:bezenarm@macewan.ca)

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Although this book is an American publication, it is a “must read” for nonprofit board and members of human resource committees. The authors provide a solid analysis of the various circumstances under which an executive director leaves a nonprofit and offer practical advice to address these various scenarios.

The authors first address the reasons why executive directors leave. They name seven factors that describe these reasons for departure – the career ladder factor, the godfather factor, the gone fishing factor, the sudden loss factor, the burnout factor, the cutting the mustard factor and the ten-year factor. The factor that best describes the reason for the departure of the executive director will influence the way this change affects the organization and present particular “damage control” approaches.

The material presented in this book reminds us that the departure of a

nonprofit's executive director is a change process. The change literature stresses the importance of planning for and managing transition. Weisman and Goldbaum identify four general approaches to change and then provide several strategies to address the change process.

The immediate or imminent departure of an organization's executive director will cause a reaction among board members and the wider community. Determining a plan of action and communicating this to staff, funders and other stakeholders are critical.

Based on my experience in the nonprofit community, I wish that I had read this book before having to experience the departure of an executive director. When faced with the challenge we, as board members, often act in a reactive as opposed to proactive manner. Weisman and Goldbaum highlight the importance of considered, purposeful action and

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