

Connections

YOUR INFORMATION DESTINATION



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Are you covered? Some simple tips for risk management

by Val Mayes



Risk management for any organization means taking the time to think about what kinds of episodes could happen, and then taking the steps needed to prevent those episodes from happening, or to reduce their impact if they do happen. A good risk management strategy can save a lot of grief, anxiety and problems.

What is the Problem?

Running an organization can be risky. There are financial activities to be concerned about, as well as

governance issues, program activities, and management of staff and volunteers. Expectations are high, situations are complex, and accountability for nonprofits is becoming more of a concern all the time.

Board members and staff have a responsibility to ensure that any organizations they are involved with are operating in a safe and reasonable manner. Having a risk management strategy will help address this responsibility.

Special Notes:

1. Buying insurance is not a risk management strategy! If you get to the point of needing your insurance, chances are some aspect of your risk management is not working.
2. We do not practice risk management to avoid being sued! We practice good risk management so that our program participants are safe, our financial affairs are in order, and our human resources are well-managed—which ultimately decreases our risk of being sued.

What is Risk?

Potential events or happenings which could ultimately lead to financial or other loss for the organization, either through damage to property, liability losses, loss of income, loss

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*What is now proved
was once only
imagined.*

William Blake

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of key personnel (including volunteers) or loss of public image.

What is Risk Management?

Minimizing, to the greatest extent possible, the risk of potential losses by going through a systematic process to identify, evaluate and control risks.

1. Identify the Risks

Set up a time to meet with board members, staff, volunteers, clients and any other relevant stakeholders, and ask yourselves “What could go wrong?” Make a list, and don’t be afraid to think outside the box. Think about those people in New Orleans before and after Hurricane Katrina.

2. Evaluate the Risks

Take some time to review your list, and think about what activities your organization is engaged in, and how important they are. Some of the things you are doing may not be worth the risk, while others are so critically important to your mission that they must be included, even if they are “risky.” Some of the things on your list may be far-fetched, but others may be things you hadn’t considered that you should have. Record what kinds of things you are doing to manage the risks now, and decide where you might need to make some changes.

Some good questions to ask:

- Where do we keep the first aid kit, and who is in charge of making sure it’s stocked?
- Do we have enough seatbelts for all the passengers?
- When is the last time we had a fire drill?
- Who has the back-ups for our computer data?

- Did we do reference checks on all our staff and volunteers?
- Who speaks to the media on our behalf?
- What kind of insurance do we have, and where is a copy of the policy?
- Do we require two signatures on all cheques?
- Does the office door lock? Who has a key?



3. Control the Risks

There are four different ways to handle risk:

- **Avoid the risk** – don’t do anything. Cancel the program, shut the doors! This is probably not an option for most of us, as we believe so strongly in the value of the work we do.
- **Retain the risk** – decide to chance it. Live on the edge, hold your breath, cross your fingers. Also probably not a great idea, for obvious reasons.
- **Reduce the risk** – plan to reduce or manage the potential hazards or difficulties, have a policy and/or plan. This could include offering more staff training, purchasing more safety equipment, implementing some new rules, developing some procedures, answering the questions above and acting on the answers.
- **Transfer the risk** – hire a contractor or buy insurance.

For example, it may be a better option to hire a company that drives people on a regular basis rather than to use volunteers or staff with their own vehicles. When you can’t control all the risks yourself, you will need to purchase insurance, such as theft insurance for your equipment, directors and officers liability insurance for your board, or tenants insurance for your office space.

Standard of Care

This is a legal concept that would be applied if you should ever find yourself in court. Basically, the question the court will ask is “did you do what would reasonably be expected from others in a similar situation?” If there are accepted standards for a particular activity, and you were not meeting those standards, you could be in trouble. There are four things to consider:

- Are there some written or published statutes, regulations, bylaws, and codes? For example, are there provincial guidelines, such as ratios of staff to participants, or requirements for CSA approved equipment?
- Are there unwritten/unpublished standards? Are there certain extra things that everyone in the industry does, even though it is not the law?
- Is there case law from similar situations? Has a similar situation come up before, and how was it handled?
- What about common sense? Really, what would a reasonable adult do in such a situation?

Use the “What Were They Thinking?” Test!

Imagine some possible newspaper headlines.

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“Treasurer with previous criminal record leaves town with group’s funds. No reference check done”

“Group leader decided only the kids needed lifejackets”

“Board member makes racist remark at fundraiser”

“Bad wiring ignites blaze – organization loses all its records”

Imagine how your board might face such a situation and the questions from the members – what were they thinking?

Case Study:

The group “Driving for Democracy” is a small nonprofit whose mandate is to encourage people to participate in the democratic process, especially by offering rides to the polling stations so people can vote. They have one part-time staff member, and a team of volunteer drivers who use their own vehicles to drive voters on election days.

They are holding a fund-raising dinner to raise money for their organization. They have sold 80 tickets of a possible 100, at a cost of \$100/plate. Wine is being served. The event is at a small community hall. Board members and volunteer drivers have been selling tickets for two months, and they are bringing their money and unsold tickets to hand in to the treasurer at the event. What could go wrong for this group? What might they do to prevent problems? What would you do if you were on their board? See page 5 for suggestions!

Creating a Risk Management Strategy

- Involve board, staff, and volunteers
- Investigate what your group does and what you have in place
- Make a plan
- Assign responsibility for the plan
- Implement the plan
- Evaluate regularly

There are many resources out there to help you with your plan. Talk to others in the same line of work, talk to an insurance broker, and check out these websites:

RCVO – www.rcvo.org

ECVO – www.ecvo.ca, go to Resources or Issues Index

Volunteer Alberta – www.volunteeralberta.ab.ca (check out the *Volunteers and the Law book and the Insurance Tool Kit for Nonprofits*)

Imagine Canada – www.imaginecanada.ca (check out the document *Developing a Risk Management Strategy – 5 steps to Risk Management in Nonprofit and Charitable Organizations*)

IBC (Insurance Bureau of Canada) www.ibc.ca ☐

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“Investing in YOUTH”: Best practices for engaging youth as volunteers

by Donna Lockhart

When I was 12 years old I had an incredible opportunity. This would have an impact on the rest of my life. I was in grade 6 at the time and our classroom joined the principal’s office. There were numerous occasions when her phone would ring constantly and no one would answer it. I sat at the back of the classroom and this concerned me. I spoke to my teacher about how important the principal must be to get so many calls but when no one answered the phone this would disappoint people. I was bold enough to suggest that perhaps some

of the students at the back of the class could go in and take messages!

Was I the first *office volunteer*? I’m not sure but the fact that the teacher listened to my suggestion, shared it with the principal and I found myself in her office getting “training” on message taking and phone protocol amazed me. It also had a profound impact on what I would do during the rest of my life. Someone made an ‘investment’ in



me and I became an active volunteer and advocate for volunteerism, especially with regard to engaging youth.

In Ontario, in 1999 the Ministry of Education implemented “40 hour community involvement” a practice in high schools that would see youth doing a 40 hour commitment in the voluntary sector as a component of graduation. Although the principle and basis for engaging youth in civic life is an honorable one, the process that followed (or lack of) and connection to graduation is not. The Ministry created the policy and left implementation up to each individual school board. What has resulted is confusion on the part of parents, students, teachers and voluntary organizations. There are success stories and there are

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unhappy students and organizations. There has been little tracking information or evaluation of the program by the school boards or Ministry. Materials on assisting youth have come from volunteer projects like CVI and the Ontario Network of the CVI project. Funding for that initiative will dry up in the spring of 2007.

What I do know is that for every student that has been negatively impacted by this so called 'volunteer community involvement' we have likely lost an adult volunteer! It has been proven that when youth have successful volunteer experiences they are more likely to volunteer as adults.

What I would like to share with you are some key ideas about engaging youth. For the purposes of this article I am not going to distinguish whether youth are volunteers, doing a mandatory placement, community service, co-operative school program or placement opportunity. There is a wide range of ages and maturity levels as well that can be explored. What I would like to share is what I consider the five key ingredients for building youth successfully into your program/organization. There are many more areas to consider...but these are my top pick.

Adjust Your Thinking/Focus

I believe as managers of volunteers that we are in the business of promoting voluntarism and its benefits. We are constantly building and assisting others to understand the important value placed on helping others. Voluntarism is civic engagement at its finest. When we engage 'youth' what we are really doing is 'investing' in the future and promoting sustainable voluntarism. If we do not support youth in these early opportunities...we face the potential loss of volunteers when youth become adults. Engaging youth successfully is investing in the future stockpile of volunteers. So

think beyond the match of your organization's needs to volunteer labor...and think about engaging youth as the investment you will make to the longevity and vitality of your organization's mission (as well as to the mission of other worthy organizations).

Be a Champion



Like any other specific group you might target to volunteer (employees, disabled, family), youth need a champion within the organization who will fight for and stand up for their engagement. Why? Because youth will 'make mistakes'. If they do not have an insider willing to fight for them, it is very easy for other staff to say "I told you so"...and out go youth, likely never to return for a long, long time. Being a champion means being passionate about why and how youth will be engaged in the work of the organization. If possible, depending on the size of your organization or agency, recruit youth champions from many areas and form a task group that lays the foundation for youth.

Plan, Plan and Plan

Often during our hectic schedules, we do not take the time to plan properly. Take time to think about all the aspects of engaging youth – from the why; to how; to policy; to position descriptions, etc. A 'champion task group' as suggested above could play this role...but the fact is be prepared and well equipped before actually recruiting youth. Determine what age range you can accommodate or what roles you will

accept (volunteer, co-op placement, internship, etc.). If you can't do it right, don't do it at all. More harm will come from being ill prepared. It was for this reason that I created the Youth Volunteer Audit — a tool to help organizations plan and prepare or for those who had bad experiences to assess what went wrong and how to adjust it.

Think Outside the BOX!

We know that youth in particular are seeking opportunities to share their own experience, and build skills and knowledge that will eventually lead them to paid employment. You can start by adjusting the existing positions you currently have for volunteers to better fit youth needs... or you can be creative, listen to their ideas or develop some projects/opportunities that are specific to youth. Here are a couple of examples:

1. When I worked in long term care, youth (4 students, age 15) did a video about how to put residents in wheelchairs on and off the elevator. This had been a major issue for staff and other volunteers who porter residents around the facility. The students learned valuable information, translated that into a great training video and provided us with a resource that we did not have time to develop. The residents really enjoyed their time with young people and one student returned to volunteer in the summer.
2. When I was with Junior Achievement (JA), finding new fundraising opportunities was always important. I had an idea of JA being the 'broker' for a community-wide garage sale but did not have the time to develop it. I interviewed several college students from the Recreation & Leisure Program who would have a four-month placement

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and who were interested in special event planning. The result—a student full time for four months who planned and executed a very successful event that raised over \$5,000 for JA all in one day. Jeff went on to graduate and get his first job as special events coordinator for Millennium events in a large community. This was a win-win for all of us.

Be Prepared to Mentor

Working with youth is a unique situation. They certainly have some life experiences to draw on (depending upon age) but these are usually limited. Most have no idea of the nonprofit, voluntary sector or

what it means to volunteer. What makes for a successful relationship with youth is when you actually play a mentor role. You will spend more time and effort working with youth because you will be sharing, teaching, training and helping them learn and grow. If you can't make this investment then my advice is don't do it...don't take on youth if you are not prepared to be a mentor. When we mentor, we build a potentially life-long commitment to our cause...the number one reason people volunteer is that they believe in the cause. I am a role model for the causes I get involved in...I connect youth to that cause and yes, I hope in the future they may give back to that cause or more importantly they will connect to the importance of civic involvement and

find their own cause to get involved with.

Working with youth is an opportunity to build and nurture volunteerism. Not every organization has a good or right fit for youth. You have to determine this in your planning. Those who engage youth successfully will help all organizations in building sustainable human resources that we know will be needed in the future. ☐

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Case study follow-up

Driving for Democracy

The following is just a sample of what could be considered.

What could go wrong?

- Volunteer drivers could have a collision while taking voters to the polls, get lost, abuse a voter, have inadequate insurance, demand payment for expenses.
- Staff could quit, leave town, forge checks, misrepresent the group.
- The community hall could have a fire, a power failure, a double-booking, ice on the steps, no washrooms.

- Ticket sales could be insufficient to cover costs, revenue could be not equal to tickets sold, board members could be selling tickets for more than marked value, tax receipts could be issued incorrectly.
- Liquor could be served by minors, no liquor license purchased or posted, liquor served to minors or those who are inebriated.
- A newspaper reporter shows up and starts interviewing guests.
- Site inspection, contract, clean-up crew and damage deposit arranged with community hall.
- Ticket sales managed through appropriate checks and balances (numbered tickets, sign-out list, break-even point determined well ahead of time).
- Liquor regulations well-researched, understood and followed.
- Group has General Liability insurance and Event Cancellation insurance.

What could be done?

- Clear job descriptions, screening, expectations, contracts, and procedures for staff and volunteers.
- Group has a risk management plan and follows it!

Updates

Welcome to the new Executive Leadership in the Non-profit Sector

MacEwan is once again proving itself as Canada's leader in education for the nonprofit sector. Building on our experience with the voluntary sector, we are very pleased to announce the new *Executive Leadership in the Non-profit Sector* certificate program.

This post-diploma certificate was developed by a team of experienced nonprofit practitioners and academics, bringing expertise from Edmonton, around Alberta and across Canada. It has been created in response to the need for executive leadership development in nonprofit organizations. A recent survey of Alberta's nonprofit organizations, undertaken by the Calgary Centre for Non-profit Management (now Centre Point), indicates a looming crisis for the sector. Of the more than 19,000 charities and nonprofit organizations in Alberta, 35 per cent of executive directors surveyed indicated that they will be resigning and/or retiring in the next two years. The loss of this number of experienced professionals is expected to have a significant impact on the services and program offerings — unless additional training is offered.

These executive positions require individuals with a combination of skills and experience that are unique to the nonprofit sector. This program is designed to fill in the skills gap and train directly for these unique needs, teaching leadership competencies as defined by the National Learning Initiative for the Voluntary Sector (NLI). NLI focuses on 'outside of the box' thinking; building on a global leadership model which focuses on the ability to

look beyond one's own community to the broader society and its needs. Quality leadership in the nonprofit sector requires this global thinking to move their organizations forward, as more and more nonprofits are required to engage in creative partnerships for success.

The Executive Leadership for the Non-profit Sector program is intended for the working professional — individuals who are currently working for a nonprofit, or who are working elsewhere and wish to move into the nonprofit sector. Students of this program are required to hold a college diploma or university degree as a prerequisite for entry into the program. This program is offered in a unique, hybrid delivery format, with one-third of the course hours offered in an executive workshop-style format and two-thirds in a cohort based on-line delivery. Offered on a part-time basis, this certificate will take two years to complete, with 15 required classroom hours per course and 30 hours of distributed learning.

Assignments and coursework are geared again for the working professional, with projects that are tailored to be completed within the current work environment. Course materials and instructional assistance are available on-line via the internet. In addition, participants are encouraged to interact with fellow classmates through an on-line 'chat' system. This is particularly so with the final Leadership Capstone Project in year two.

The current program schedule is as follows:

Year I—Course List

Fall Term

- Program Orientation
- Executive Leadership in the

Non-Profit Context

- Organizational and Community Development

Winter Term

- Board Governance and Collaborative Leadership

Spring Term

- Leading Human Resource Development in the Non-Profit Sector

Year I—Classroom attendance required for the following dates:

Fall Term

- September 14 & 15, November 2 & 3 & December 8, 2007

Winter Term

- March 28 & April 19, 2008

Spring Term

- June 5 & 6, 2008

Year II—Course List

Fall Term

- Strategic Financial and Fund Development in the Non-Profit Sector
- Introduction to Public Affairs—Government and Regulatory Issues

Winter Term

- Leadership Capstone Project

* Please note: the classroom schedule for Year II is currently under development.

All classes will be held at MacEwan's City Centre Campus, located in downtown Edmonton. Program costs have not yet been determined. For more information on the Executive Leadership in the Non-profit Sector program, please check www.macewan.ca/leadership, e-mail: leadership@macewan.ca, or call 780-497-5268.

Learning Opportunities

“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.

“Responding to Diversity”

Tuesday, February 13, 2007

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

Grant MacEwan College

10700-104 Ave., Edmonton, AB

Maureen Collins, Muttart Fellowship & Executive Director, Edmonton John Howard Society

Many organizations today want to increase their capacity for service provision to diverse communities. This presentation will focus on the challenges, opportunities and pressures organizations face as they strive to become more responsive to diversity in their community. It will cover the concept of *working with*: developing meaningful partnerships, reciprocity and sharing power. It will also introduce the workbook that was developed as a tool for those who want to bring their heart and spirit to any discussions and planning about diversity.

To register for this free event, call 780-497-4780 or e-mail voluntarysectorevents@macewan.ca. Continental breakfast will be served. For parking information, see

www.macewan.ca—click on Quick Links Parking.

Watch for our next So What speaker proposed for April 2007.

2007 Board Leadership Conference: Ideas Into Action

Saturday, March 24, 2007

Grant MacEwan College

10700-104 Ave., Edmonton, AB

This conference offers a variety of sessions addressing the needs of both beginner and experienced board members and the staff that work with them. Some of the sessions will cover:

- Legal Liabilities and Duties
- Financial/Audit Systems
- Fund Development
- Recruiting/Utilizing Highly Skilled Volunteers
- Organization Policy Development
- Strategic Planning for Boards

For more information and to register visit www.ecvo.ca. The program is available online at ecvo.register@interbaun.com.

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


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.

One workshop is planned for Devon, April 17, 2007, and one for Fort McMurray in late spring.

For details and location, check out our website at www.rcvo.org or call 780-497-5616.



Vitalize 2007
Provincial Voluntary Sector Conference
Thursday, Friday, & Saturday,
June 7, 8 & 9, 2007
Telus Convention Centre
120 9 Ave. SE, Calgary, AB

Vitalize is the name and 007 is for you only! You will see a variety of educational and motivational sessions geared towards enhancing Alberta's voluntary sector. Not only will there be outstanding sessions but also two outstanding keynote presentations. Your conference registration will include all conference meals, a delegate kit bag, the Friday Evening Gala and entrance to “Vital Village” (Exhibitor's Fair), a place where you can meet and mingle with your peers from the voluntary sector and gather valuable information.

For information phone 780-422-2247, fax 780-427-4155, e-mail vitalize@gov.ab.ca, or visit the website at www.vitalizeconference.ca.

Succession planning in the voluntary sector: A remedy to leadership recruitment woes?

by Jim Klingle

"Succession planning is so important, but no one is doing it."

- Donna Stark, Director of Leadership Development,
- Annie E. Casey Foundation

What is Succession Planning?

The Human Resource Council (2006, p. 2) defines succession as "planning that acknowledges that staff will not be with an organization indefinitely and it provides a plan and a process for addressing the changes that will occur when they leave." Many incorrectly assume that succession planning in voluntary sector organizations is only on the executive director. In fact, it applies to all key staff positions. According to the Human Resource Council (2006, p. 2), key staff positions are "those positions necessary for the operations of your organization, and because of skill, seniority, and/or experience, will be hard to replace."

Who Does Succession Planning in the Voluntary Sector?

Little research could be found on the extent to which Canadian voluntary sector organizations undertake succession planning. Hall (2006, p. 2) cites a national survey of 2,200 executive directors at charities commissioned by the Annie E. Casey Foundation that found more than half of their organizations have no succession plan. Hall (2006, p. 3) cited other sources, including the Greater Kansas City Community Foundation that found 86 percent of voluntary sector charities in Kansas City, Missouri had no succession plans. One Canadian study by Community Development Halton (February 2005, p. 2) found that 77 percent of voluntary sector organizations in the Niagara Region

of Ontario did not have a staff succession plan in place.

The sad reality is that by not having a succession plan in place, most voluntary sector organizations are at best reactive when key staff retire, are terminated, or experience unexpected illnesses. According to the Human Resources Council (2006, p. 2), "Without a succession planning process, an organization may not have the means of ensuring that the programs and services that are crucial to its operation are sustained beyond the tenure of the individual currently responsible."

What are Some Emerging Challenges in Recruiting Key Staff Positions?

The growing challenge of recruiting key staff positions in coming years should not be underestimated. According to Saunders (2004, p. 21) nearly 39 percent of voluntary sector employees in Canada were 45 years of age or older in 1999. Many of these individuals will be leaving the workplace in the next decade. Community Development Halton (February 2005, p. 4) identified that 47 percent of senior positions within the Niagara region voluntary sector were held by those over the age of 45 and, by 2015, 50 percent of the current Niagara voluntary sector workforce would be gone.

Sankey, (2006, p. 1) interviewed Carlo Jensen, Director of Consulting for the Calgary Centre for Non-Profit Management who stated that a lack of succession plans and suitable replacements, burn-out, an aging leadership population, a dwindling pool of support workers and core funding issues have all come together to pose serious risks for the entire sector.

The remainder of this article is dedicated to discussing the following topics:

- What prevents voluntary sector organizations from developing effective succession plans?
- What are the benefits to voluntary sector organizations that undertake succession planning?
- Who is responsible for succession planning in a voluntary sector organization?
- What types of succession planning can be undertaken by voluntary sector organizations?
- What are common elements of a succession plan?
- What resources are available that offer sample succession plans and policies?

What are the Barriers to Undertaking Effective Succession Planning?

We know that key people in our voluntary sector organizations will eventually leave. If that is a certainty, what keeps us from planning for their departures?

The Human Resource Council (2006, p. 4) lists the following common barriers or obstacles to effective succession planning:



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- The small size of many voluntary sector organizations limits the number of staff positions available as opportunities for advancement.
- Senior staff members often stay in positions too long, despite the fact that the skills needed for the job may have changed or they are no longer making a meaningful contribution to the organization. Such individuals have no interest in participating in a succession planning process.
- Long-time executive directors, or organizational founders often find it difficult coming to terms with imagining a time when s/he would need to let go of the organization and begin to explore what letting go might look like.
- Misunderstandings among board and staff as to who is responsible for developing succession plans.
- Continual daily demands on key staff members that do not allow them time to participate in the development of succession plans.

How Can Voluntary Sector Organizations Benefit from Succession Planning?

The Human Resource Council (2006, p. 3-4) identifies the following benefits to a voluntary sector organization of undertaking succession planning:

- The organization has a plan to support service continuity when key people leave the organization.
- The organization has a continuing supply of qualified, motivated people (or a process to identify them) who can take over when key people leave the organization.
- There is an alignment between the organization's vision and its human resources that shows an understanding of the need to have

appropriate staffing to achieve strategic plans.

- The organization shows a commitment to developing career paths for employees that will enhance the organization's ability to retain exemplary staff members and volunteers or recruit them.
- The organization acquires a reputation as an employer that invests in its people and offers opportunities and support for staff advancement.
- The organization demonstrates to key stakeholders (clients, funders, employees, and volunteers) that it is committed to and able to provide high quality programs and services, even during times of transition.

Who is Responsible for Undertaking Succession Planning in Voluntary Sector Organizations?

The board of a voluntary sector organization is responsible for hiring the executive director. It is therefore the board that is responsible for succession planning for the executive director position as well as future board volunteers. Of course, it is critical that the executive director be part of developing a succession plan for her/his position, since s/he brings a depth of knowledge and understanding of the position's critical knowledge, skills, and experience.

The executive director, as the position responsible for hiring staff, is responsible for having a succession plan in place for the other key organizational positions. As the Human Resource Council (2006, p. 3) notes, however, this succession plan would likely be developed with assistance from the organization's management team with input from those in key staff positions.

What are Some Common Elements of a Succession Plan?

While there is no "one size fits all" succession planning format for voluntary sector organizations, Howe (2004, p. 2) identifies the following elements that should be part of a sound succession plan:

- A list of the key staff positions that may need to be filled in future.
- A description of job specific competencies/descriptions for each of the key staff positions.
- Possible timeframes for when key staff members may leave the organization (particularly in cases where older staff may be considering retirement).



- An assessment of internal staff talent and identification of gaps.
- Identification of high potential organization staff or external talent.
- A development plan for high potential staff.
- Possible supports for high potential staff, particularly succession candidates.
- A system for tracking both high potential organization staff and external talent.

When focusing on a succession plan for an executive director, policy-governing boards of volunteer organizations would benefit from starting their succession planning process by developing a succession

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Order your 2006/2007 Directory of Community Services now!

The Support Network's Directory of Community Services is an indexed listing of agencies offering human services in the Capital Region community. Services address such things as counselling, shelters, family violence prevention, advocacy, youth services, seniors services, addictions, and so much more. It is an invaluable tool for social workers, counsellors, doctors, and any other community caregiver.

The geographical scope includes the Capital Health Region (Edmonton, Sturgeon County, Strathcona County, and Parkland County).

To order, please call
780-482-0198.

You can also order online at:
[www.thesupportnetwork.com/
publications.html](http://www.thesupportnetwork.com/publications.html)

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plan policy. As outlined by Transition Guides (2003, p. 1), the key components of a succession plan policy should include:

- A statement of commitment to prepare for inevitable leadership change.
- A statement of commitment to assess leadership needs before beginning a search.
- A plan to appoint interim leadership to ensure smooth operations and compliance with contractual obligations.
- Outline of succession procedures, including:
 - Internal management succession to the interim position.
 - Time frame for making the interim appointment.
 - Time frame for appointing a board transition committee, and
 - Roles of the transition committee, e.g. communication with stakeholders, identifying a transition management consultant, conducting an organizational assessment and designing the search plan.

Where Can I Find Examples of Succession Plans and Policies?

The following resources provide specific examples of succession plans and policies developed by voluntary sector organizations:

Alice Niwinski (2006). *A Model Succession Process: Vancouver International Writers Festival*. www.centreforsustainability.ca/resources/VIWFpercentSuccessionpercentplan.pdf

Association of Baltimore Area Grantmakers (2006). *Executive Leadership Succession Policy*. www.enterprisefoundation.org/resources/Trainingconf/training/elearning/SampleSuccessionPlanPolicy.pdf

TransitionGuides (August 2005). *Executive Succession Plan Policy*. <http://www.transitionguides.com/eds/succession.htm>

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Community Development Halton (February 2005). Niagara voluntary sector labour market study. *Community Dispatch. An InfoFax of Community Development Halton*, 1-4. Retrieved December 1, 2006 from: <http://www.cdhalton.ca>

Hall, H. (2006). Planning successful successions. *Chronicle of Philanthropy*, 1-7. Retrieved December 3, 2006 from: <http://www.philanthropy.com/free/articles/v18/i06/06000601.htm>

Howe, T. (2004). Succession planning and management.

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Bridging the communications gap – the Hanna portal

by Angela Gaviotakis



Imagine having a tool for your community that would allow not-for-profit and service organizations in the voluntary sector the ability to provide information about what's happening in your community, in addition to a fully functional website, at an affordable cost.

Many not-for-profits do not have a budget that allows them to create and maintain a website, which in today's market is increasingly necessary. The Hanna Learning Centre's intent was to provide an affordable web page to each organization that provides service in Hanna, and have all of the pages housed within one site. The site would provide the public with information about events taking place in and around Hanna, and would provide information on available services.

A key component of the site is that all news and events are posted by the individual organizations, ensuring that the information is current and reflective of each organization. Furthermore, the Centre builds capacity and skill development in volunteers of all ages by teaching them how to post their information.

In order to make the portal completely functional for community organizations, the site needed to be able to support other features, such as uploading files and photos. In November 2005 the Hanna Learning Centre was approved for funding from the Wild Rose Foundation under the Voluntary Sector Advancement Program (VSAP) to upgrade aroundHanna.com. These dollars will be used to purchase the

equipment and software necessary to create the new build of the community portal, and to provide it to five communities: Hanna, Taber, Oyen, Consort and Vegreville.

The same web developer, who built the original portal from a wish list of ideas, is back on board for the next one. Terry Duchcherer of Netago Wireless has networked with colleagues internationally in order to create modules for this next build of aroundHanna.com.

The new site will allow each organization to:

- Have more control over their page in terms of who has permission to add, remove or change information or layout.
- Add pages under their organization. People looking for specific information will be able to view only what they want, not information from every tier.
- Determine the look of their individual page – layout, colour scheme, modules – so that it is truly unique.
- Upload their logo, pictures, and files.
- Support online discussion forums.
- Set permissions for users to ensure security. There will be several levels of permissions so that while the public has access to the hockey schedule, the Executive can have a secure online Board meeting using the discussion forum, with sensitive documents (minutes, etc.) protected for their view only.
- Support RSS and XML feeds, which allow you to pull feeds from other websites (i.e., news from another webpage that affects your organization) and allow information from your site to be pulled to others.
- Support the use of an alias. If you already have a domain

registered, you can have it routed to the aroundYourCommunity website page, which will be fully functional and under your organization's control.

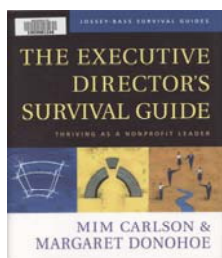
- Newsletters can also be sent through the portal. This eliminates the need to constantly update your bulk email distribution list.

An interesting side-note of the realization of aroundHanna.com is how intrinsic it has become in the community. The portal became much more than an opportunity for an affordable website and source of information. It has become a gateway into our community, an economic development and tourism tool as well as a tool for marketing and information. It's "where you go when you don't know." People email the site from literally all around the world for information about our area and others. We are able to showcase our community, give people a virtual snapshot of what is available here, and provide them with many reasons why they should visit and/or live in Hanna.

One of the end goals has always been to foster sustainability for community organizations, to make it easier for the people who contribute so many volunteer hours to the betterment of Hanna and District to be able to do the work they do more easily. In addition was the desire to provide these tools to other communities, to enable them to increase the capacity of the community to meet their needs, and so we call this community portal project "Bridging the Communications Gap".

To learn more about the VSAP Community Portal Project, or how to bring the portal to your community, please contact: Angela Gaviotakis, Hanna Learning Centre, Box 1255, Hanna, AB T0J 1P0, 403-854-2099, angela@hannalearning.com

BOOK REVIEW



The Executive Director's Survival Guide: Thriving as a Nonprofit Leader

by Mim Carlson & Margaret Donohoe
HD 62.6 .C266 2003

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

The job of nonprofit Executive Director (ED) can be one of the most rewarding yet complex careers. *The Executive Director's Survival Guide* suggests how to survive and thrive in this tough but fulfilling job. The authors, Mim Carlson and Margaret Donohoe are experts on the topic of nonprofit leadership. They use an accessible question-and-answer format to help the busy Executive Director comprehend the complexities of the position and discover new ways to be successful.

For all Executive Directors, this resource offers a first-aid kit for coping with day-to-day challenges. The authors, who have extensive experience as Executive Directors answer questions that are of most concern to you and cover a wide range of timely topics. The topics include understanding organizational culture, following on the heels of a founder, and leading organizational change.

The Executive Director's Survival Guide also contains a wealth of invaluable resources on where to go for more guidance.

To ensure success as a nonprofit leader, this book suggests how to build productive relationships with the Board of Directors and staff, as well as external stakeholders. It contains vital information on leadership and provides insights on when to lead, when to manage, and when to follow others. It also explores when it's time to leave and offers ideas for creating a smooth transition for the ED and the organization.

Comprehensive in scope, *The Executive Director's Survival Guide* is filled with ideas and encouragement to help the busy ED pursue professional development and lead a more balanced life.

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