

# Leadership Task Force Report

1/26/2015

Jay S. Miller, Chair

Task Force Members: Tom Mullin, Chuck Lennox, Jim Covel

Margo Carlock, staff representative

The leadership task force has held several phone discussions and met during the Denver NIW. The topic of leadership training was included throughout the NIW. The topic was very important to our members at all levels. See notes below from several of those meetings and comment opportunities.

This task force was created to investigate the need for leadership training and support, and to identify methods to grow interest and skills in leadership in NAI. The many discussions during the NIW demonstrate that that the membership desires increased support from NAI, and more training.

At this time the task force is considering the following recommendations:

1. Replace this task force with a broader committee that includes representation from the OUs.
2. That leadership falls into two categories:
  - a. **Processes competency:** management skills such as bookkeeping, reporting, budgeting, fundraising, Robert's Rules, etc.
  - b. **Leadership competency:** leadership skills of motivation, organization, team building, gaining cooperation, goal setting, workshop organization, etc.
3. Review leadership training opportunities presently available for content, accessibility, and gaps.
4. Increase the visibility, organization, and breadth of leadership training available through the NAI website.
5. Have a track of leadership training webinars targeted toward specific OU officer skills, including one on advancement in NAI leadership.
6. As the CIM curriculum is revised, include more leadership skills.
7. That there be a designated, identified staff person whom OU leaders can contact for leadership questions and support.
8. That NAI hold a leadership workshop at each NIW, beginning with Virginia in 2015, to include training in the categories shown in item 2.
9. That the National Office develop a leadership training program that can be delivered by staff or board member at OU meetings, or on request, similar to the other workshops presented by National Office staff. This might take the form of a keynote followed by a workshop.

## Notes from the several leadership meetings during the 2014 NIW, Denver

### **Board meeting**

Leadership was not an agenda item, but leadership came up in several discussions and is included in the operations plan and the strategic plan.

- Create a set of leadership webinars and other leadership training available to each OU officer when they come on board.
- Identify leadership training and material currently available, evaluate its effectiveness and organize it so that it is accessible.
- Leadership turns over regularly and we need to provide organized and easily accessible training.

Operations plan, page 14:

Initiative area 4: Strengthen OUs: Provide leadership training to OU leaders.

Strategic Plan, Page 16:

Theme: Ensure organizational viability; by end of 2016

Strategy: Implement an internal volunteer/leadership development program

Performance indicator:

- 1 - Identify a task force on leadership development
- 2 - Develop a leadership development plan that identifies skills and traits desired by the organization with a timeline for implementation.

### **Region 6 OU meeting included a brief discussion on leadership**

- Apply Maslow's – leadership can be a scary thing, we need to help people feel comfortable and valued, and train them to be confident and successful.

### **Leadership Task Force breakfast meeting notes**

Margo Carlock, Jim Covell, Tom Mullins, Chuck Lennox, and I met to further discuss leadership training needs. Here are my notes of that meeting.

- We need to reflect and respond to the needs of our younger members. Add a younger person to the committee; a young Puerto Rican was mentioned, (I think that is Marisol Castro.)
- Do a survey, include age to see how needs vary with age and experience. Set up a survey on survey Monkey.
- Include leadership in each Advisory Council meeting; we want the AC to take a leadership role.
- We not only need to train, but also need to motivate people to step up to leadership roles at all levels.

Discussion fell into two areas of leadership training:

- **Processes competency:** management skills such as bookkeeping, budgeting, fundraising, organizing workshops, reporting, Robert's Rules, etc.
- **Leadership competency:** broader leadership skills of motivation, organization, team building, gaining cooperation, goal setting, etc.

We discussed the lack of transition planning and the loss of documents and lack of records retention over time as OU officers changed. Margo noted that there is a lot of information on the website designed to be useful to OU leaders, and at one time there was a scavenger hunt type activity that led the leaders through this information. We need to identify these documents, review them and organize them so they are easily found by NAI leaders, and we need to let each leader know where they are and how to use them.

Tom noted that a model to entice members to step into leadership roles is to begin with asking them to serve on a task force that has a specific goal and a short timeframe. Then move to serving on committees, then become an officer.

Jim noted an excellent program on leading through change, which most members are facing or going through at this time in many ways – in their personal career and through upper level retirements and other agency changes taking place.

Tom suggested we consider a sponsored leadership talk at each NIW, asking a sponsor to bring in well known speakers and growing this leadership plenary session into a significant attraction of the NIW.

Jim – Agencies and organizations do a lot of things and have specialized leaders in many areas. Interpreters are *'the keepers of the vision'* and NAI needs to promote that and add value to that role.

Margo – we could hold a series of pre-NIW leadership workshops, and have a clearly defined leadership track, including asking past leaders who may have dropped out to return and present as mentors and leaders in the field.

Action steps:

Identify leadership training and materials NAI now offers

Define issues affecting our members through a needs assessment (Margo has one planned and can add leadership questions)

Make recommendations that might include:

- Strengthening the CIM program with more leadership skills
- Leadership webinars
- Improving leadership materials on the website
- Sessions at NIW
- Sessions at OU meetings

### **Advisory Council leadership discussion group notes**

Preceding the NIW, the OU Advisory Council met. At the leadership task force's request AC Chairman Kevin Damstra included a break-out session on leadership needs. Task force members Tom Mullin and Chuck Lennox attended, Chuck provided the following notes.

## **NAI Advisory Council Meeting 11/17/14**

Notes from Leadership Development Breakout Group

Chuck Lennox, facilitator

Question: *What are issues around leadership development for Regions & Sections?*

### **Recruitment of volunteers** to staff positions and to take on tasks

- The “Committees of One” syndrome (one passionate person takes on an office or a duty but does not develop others as members or leaders ... i.e. a committee of one is NOT a committee)
- Need to develop buy-in and ownership but further develop committees
- Leadership needs to be considered across the whole organization
- The National Workshop Effect – when regions were more involved in hosting the National Workshop when held in their region, they were better able to recruit more volunteers who then took on some regional tasks

### **Membership issues**

- Competition with other professional organizations in the region or nationally
- Employer loyalty and support to being active with a professional organization is slipping
- Need to do more outreach to universities and colleges to make students aware of NAI
- Use technology and webinars to connect

### Use **membership recruitment incentives** to build membership

- Need to review overall membership numbers vs. retention
- Could there be an anniversary type of email that goes out 3-4 months before expiration to remind them of 4-3-2 months left before the deadline
- Is there a way to personalize it?
- If a member first joined as a CIG, is there a way to involve the CIT who certified them?
- Can we standardize membership information at CIG courses and promote the benefits of org units?
- Could a regional officer call into a workshop and say hello?
- Is there a role for the region to play in membership renewals? How effective are we at communicating our needs?

### Support **student chapter** leaders more (faculty and students)

- Need to update the NAI Academic Directory
- Need to update NAI marketing materials to handout to students
- Need new NAI Leader **orientation sessions**
  - Like-minded jobs
  - Update region/section job descriptions in Manuals
  - What skills can you learn and practice by taking on this job?

- Tie in skills that you learn can be applied to your job for advancement
- Add in a piece about “how to convince your boss to let you volunteer for NAI and learn skills that you can apply to your job (similar in concept to the “why you should attend a national workshop piece)
- Continue with personal skills and values you learn (i.e. networking, friendships, fun, etc.)
- Produce a second “*I am NAI*” video but focus on the personal things you gain using storytelling from participants – what have I gained personally? And the value of leadership. Consider using it as a promo piece for a Leadership Skills Institute at 2015 National Workshop
- Have a Leadership Skills Workshop at the 2015 National Workshop.
- Find a way to use “formers” in leadership development and mentoring within NAI (former Presidents, board members, org unit leaders, etc.)
- Increase community among all org. unit leaders, especially among similar officers (i.e. membership chairs)

Identify and use **alternative communication tools** (AAM’s online forum is a good example)

- Identify how NAI is “valuable to me personally” (see 4th bullet in updating manual section above)
- Identify core services but ... include intrinsic items such as professional connections, make new friends, camaraderie, recharge yourself
- Develop “dough-nut style” graphic template for org units to use on their websites patterned off of the “I am NAI” campaign. Org units would drop in an image and a quote stating what a current volunteer gained from NAI on leadership or personally. Could be used as a marketing tool for recruitment and/or for the *leadership skills institute* next year at the National Workshop

### **Training and development:**

Leadership development is needed sooner rather than later for org units (don’t wait until next National Workshop). Suggested Leadership Development webinars for 2015.

- one a quarter on finances – org unit treasurer + other officers, mentoring new treasurers
- Membership – tools for analysis, recruitment and retention ideas, mentoring new chairs
- Volunteer recruitment, management and recognition
- Building the NAI community
- Communications – use of existing tools, share new ideas, social media and org units, etc.

### **The Innovations Room**

Participants in the Innovations Room had comments related to leadership, plus, I led a discussion session on the topic. In that session the discussion became serious regarding the lack of support for OU officers from the national office and how some OU directors had a very difficult time engaging members with no resources from the

national office. Clearly, there is room for improvement here and an opportunity for the national office to provide valuable training and support.

Written comments on a variety of topics were made on the several poster sheets around the Innovations Room. Plus, I placed three poster sheets with specific questions about leadership. Notes about leadership included:

- Have a resource list page on the website where folks could post how they found funding, overcame budget deficits, and made exhibits from nothing.
- Develop a toolkit to educate incoming elected officials and others decision-makers about what we do and why it's important.
- More workshops like "Effective Training Earth and Sky"

### **Advancing your career**

Have sessions/webinars on:

- Managing your boss
- Individual development plans
- Mentoring/shadowing experiences
- How to be active rather than just wait and see.
- Career options explained/explored
- What options do I have if I don't want to go into admin or mgmt.?
- More "move up managing" sessions
- Help higher mgmt. understand our profession

### **Region/section leadership**

- Programs on shadowing, mentoring and exchange programs.
- NAI staff have more face time with advisory council members if we are to be the driving force of NAI. We need more time and resources.
- NAI staff attend regional mtgs – meet with regional officers for discussions of our concerns and for training sessions. Perhaps in pre-workshop format.
- What can we do when officers aren't doing their job? Are there term limits?
- Need a road map for new leaders telling us what to do, when, and with suggestions.
- We need OU job descriptions. I became director and there's nothing telling me what to do.
- Workshops for each new OU officer on NAI requirements and procedures.

### **National level**

- Step up to make a difference
- Time mgmt. skills
- More member involvement on committees, task forces, etc.