

Volunteer Recruitment: Building a Deeper Bench

PRESENTER

David Reed, Reed & Jolly, PLLC



Your Facilitator

David A. Reed

Attorney at Law
Reed & Jolly, PLLC
Fairfax, VA

David@reedandjolly.com

(703) 675-9578

Start Here: Diversity and Inclusion

- What else do you see as you look around the Boardroom?
 - Do you see your staff?
 - Do you see your community?
 - Do you see your most active membership groups?
 - Do you see borrowers?
 - Do you see remote access users?

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Think Broad Strokes

- Gender
- Race
- Sexual Orientation
- Geography
- Generation
- National Origin
- Age
- Marital Status
- Religion
- Disability
- Income
- Education
- Parental Status
- Veteran
- Personality
- Credit

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There Is a Difference

- **Succession Planning**

The process of identifying and preparing new leaders to replace old leaders when they are disabled, move on, retire or die.

- **Career Pathing**

The intentional identification of the skills, experiences and aptitudes necessary for an employee to move forward on a chosen path for career development within an organization.

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Why Would I Want to Retire?

- Board seats are a finite resource!
- Is the expectation that you will be a volunteer for life?
- Term Limits
- Director Emeritus
- Committee System

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What do your bylaws and other governance documents say about this issue?

- Elections – Article V
- Nominations – Article V
- Committees
- Volunteers

How big is your Board? Article VI

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Prerequisites for Directors

1. Must make a commitment to serve by taking an active role and having an enthusiastic attitude;
2. Must have the ability to work as a team member;
3. Must be a credit union member in good standing;
4. Must be bondable;
5. Must understand or have the ability to learn financial statements and the laws governing credit unions; and
6. Can't be a criminal.....

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Why Did You Do It?

- How did you become a volunteer?
- Would the same sales pitch work on you again now?
- Is it worth it?
- Has it improved with age?

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Volunteer Recruitment

- Board Assessment
 - Do you have one?
 - What does it reveal?
- Look at what you currently have and where you would like to be in the future
 - Is effort an issue?
 - Community representation?
 - SEG representation?
 - Particular skill set desired?

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What would you tell a prospective volunteer?

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Why Would They Serve?

- Community Impact
- Service Opportunity
- Credit Union Advocate or PFI Member
- Good Experience
- Educational/Professional Opportunities
- Social Interaction
- Beware of the one hit wonder!

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Do You Have a Plan?

- What is the definition of insanity?
- Where to begin?
 - Define your goals
 - Make a list. Check it twice.
- Do you really believe this issue will get better over time?

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Who Finds Them?

- CEO/Management
- Board
- Nominating Committee
- Walk Ups

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The Age-Old Question

Advertise
vs.
Tap on the Shoulder

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Where Do You Find Them?

- The Hard Facts: You may not know the next great volunteer.
- Who do you see on a regular basis and is that the type of volunteer you need?
 - Retired vs. working
 - SEG affiliation
 - Community involvement
- Look at the Credit Union's web of influence.

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You Tell Me – where are you looking?

Transparency

- Be realistic about the duties and obligations of a volunteer.
- Tell them what you expect.
 - Do you fully understand it yourself?
- Go over the time commitment
 - Meetings
 - Training
 - Planning session
- Potential liability is always a question.

Volunteer Options

- Committees
 - Community Involvement
 - Member Service
 - Budget/Finance
 - Ad Hoc
- Associate Board Positions
 - JV Board
 - No voting rights
- Supervisory Committee
 - Advisory committee members

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Opportunity to Observe



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Big Finish!

- The time to consider your volunteer succession program is now!
- Question the way the current process works and consider what the next 5 years will bring.
- There are many options to customize a program to build a deeper bench of volunteers.
- If there are no available seats at the table, why would anyone wait in the bar?

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Enjoy the Moment



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It is what it is,

but...

It will be what you make it!

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