

How to Say ANYTHING to Board Members and Volunteers:

Creating Powerful Relationships That Work

By Shari Harley

Leading an association is challenging in ways your friends who work in corporations will never understand. Who besides association executives gets a new boss every year, has to manage volunteers rarely seen, and has board members with different interpretations of your role? Rather than just surviving a difficult President or ineffective board, association executives can make these relationships work for them.

Association executives and boards only have one year together. They don't have time to guess how to work with people or how to best leverage people's skills and experience. They don't have time for strained relationships with poor communication. To have a productive year, boards and association staff need to work well together when the year starts, not six months into the members' term.

As counter intuitive as they may sound, start your board terms differently than how you think you should. Rather than starting the year with strategic planning and goal

setting, start your first board meeting or retreat by setting expectations and asking questions to help board and staff members get to know each other better. Because until you know who you are working with, why fellow members joined the board, and what others are expecting of you, you're not ready to begin working.

When I lead association board retreats and meetings, we start the day by setting expectations. First we set expectations for that day's meeting and all ensuing meetings that will take place during the year. We make a list of the guidelines by which board members agree to be held accountable, write those guidelines down, and board members and staff review them at every meeting.

Then I pose a series of questions I call Candor Questions® to the group and give them time to answer the questions together.

Here are a few of the Candor Questions® board members and staff answer, as a group, during the retreat:

- Why did you join the board/staff? What are you hoping the experience will provide?
- What skills do you bring? How can we best leverage your talents and experience?
- What past work experience or education do you have that we may not know about?

Next we discuss working style preferences, so the board and staff work together efficiently and don't unknowingly frustrate each other.

Here are a few of the working style preference Candor Questions® participants answer:

- How do you like to communicate? By phone, in person, via email or text?
- Are you a morning or a night person? What time of day do you do your best work?
- What time of day do you prefer to meet?
- What are your work-related pet peeves?
- How will I know when you're frustrated?
- On what can we partner and work together?
- What information do you want to receive from me, how frequently, with what level of detail, and in what format?

The last step of the getting-to-know you process is to give chapter

executives and board members permission to give feedback. People are human and human beings make mistakes. At some point during the year a board member will frustrate a staff member or another board member and vice versa. Because people tend to avoid conflict, board members and staff alike are not likely to talk to the person about their concerns. Instead they will likely tell someone else or work around the person. Talking about people rather than to them doesn't work, especially for a group of people who only have a year to work together.

Most people don't give feedback because they are afraid of the consequence of doing so. It's natural to be concerned about the other person's reaction and thus opt to say nothing. Agreeing to give feedback directly, throughout the year, without experiencing a consequence for

doing so, makes all the difference. It is the difference between being able to say anything to anyone and being able to say nothing. Agreeing to give feedback can sound something like, "We as a staff and board agree to talk to each other directly about whatever happens during the year. And when the conversation is over it's over."

Asking for feedback can be very casual. You could ask the following questions: "We've been working on putting together this conference for a while and I wanted to ask how things are going. What's working about how the committee is working together and what could we do differently?" It can be difficult to ask for and receive feedback. But consider the alternative. Without regular feedback we work with people in the dark, never knowing if we are damaging or

strengthening our relationships.

If you don't have the time to have a retreat or if you don't have regular meetings, setting expectation and feedback conversations can happen individually, both over the phone and in person. The conversations can be formal, like the one described above, or they can be informal. Whenever you talk with someone, ask a question. It could sound something like this, "I scheduled our meeting via Outlook today. Did that work for you? Would you prefer I do something different next time?" Or, "We always meet for breakfast on the east side of town. Does this time of day and location work, or would you prefer another time or location?"

The point is to set expectations by asking more questions at the beginning of anything new. Don't guess what



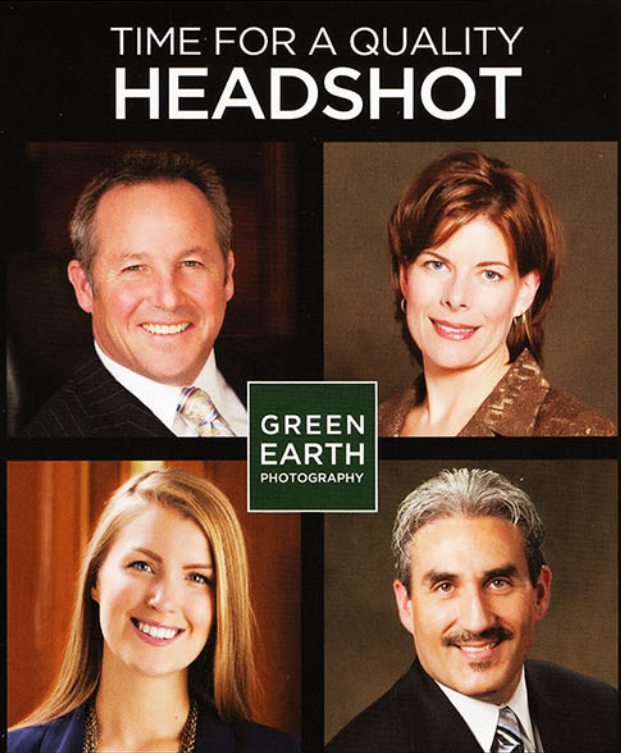
WhippleWood CPAs provides accounting, tax and business consulting services to clients throughout the United States and abroad.

We use a team approach to help clients accomplish their personal goals through a variety of services, including:

- Accounting Services
- Audit, Review & Compilation Services
- Consulting Services
- Employee Benefit Audits
- Payroll Services
- Taxation Services

Contact us today to get our professionals working on your needs!

11852 Shaffer Drive, Building B
Littleton, CO 80127 • 303-989-7600
www.WhippleWoodCPAs.com



TIME FOR A QUALITY HEADSHOT

GREEN EARTH PHOTOGRAPHY

KATIE WARNKE
KATIE@GREENEARTHPHOTOGRAPHY.COM
303.588.7446
MAKE AN IMPRESSION.

“To have a productive year, boards and association staff need to work well together when the year starts, not six months into the members’ term.”

people need and want from their board experience and from you. Ask!

Here’s a review of how I recommend kicking off your year:

- 1 Set and agree on guidelines of how meetings will be run.
- 2 Review those meeting guidelines at the beginning of EVERY meeting ALL year. People are human and human beings forget the guidelines and make mistakes. Set people up for success by establishing and reviewing

guidelines every time you meet.

- 3 Ask questions about skills, work history, desires and working style preferences. Train people how to work with and win with you by telling them what you need. Make it ok to both have and make requests.
- 4 Lastly, give permission to give feedback directly to people as things happen. Make it safe to tell the truth.

These setting expectation and feedback conversations don’t happen once a year,

they happen in an ongoing way. I implore you to take the time to get to know the staff and volunteers you work with better and differently. Don’t assume you know what strengths people bring or how they like to work. Likewise, don’t assume people will work with you the way you like to work. Every day we train people to work with us –either inadvertently or directly. ■

Shari Harley, speaker and author of the book How to Say Anything to Anyone, runs Candid Culture, a Denver-based training firm that is bringing candor back to the workplace, making it easier to tell the truth at work. Shari speaks at conferences throughout the U.S. and conducts board retreats and trainings, helping boards hit the ground running. Learn more about Shari and read an excerpt from her book at: www.candidculture.com.



THE VILLAGE at BRECKENRIDGE



**STAY CENTRAL
STAY UNIQUE
STAY BRECKENRIDGE**

Two great properties offering over 30,000 sq ft of centralized meeting space & 400 guest rooms

Historic downtown featuring over 200 unique boutiques, bars, restaurants, and unlimited outdoor activities

CONTACT
DEBRA GOODMAN 866-560-9019
breckresorts.com



DOUBLETREE by HILTON

