

## Themes from Welcoming Organization Huddle Discussion

### Topic #1: Data - What is needed to define/characterize/measure issues related to the "welcoming organization" theme?

- Evaluate/profile membership and volunteer patterns: Look at where our members work/live and that can define if we need to narrow our geographic area. Have patterns changed from a quantitative perspective? (Note: Of our current membership, 8% are in Washington and 92% are in Oregon. Of the members in Oregon, 84% are in the Portland Metro area. Another stat is that 85% of our membership live or work in the greater Portland Metro area. I do believe that percentage is higher than it was a few years ago.)
- Survey members *and non-members*
  1. Determine what they want from the Chapter
  2. Do not leave open-ended questions. Questions must be very specific, targeted and provide clear direction on actions we can take to improve the chapter. Questions should be artfully crafted.
  3. Do focus groups in addition to questionnaire so that we can get to the core.
  4. Decide what we want to do and who we want to serve. Determine the survey sample. Who do we want to sample (have we decided the markets we want to serve)?
  5. I like the sheet that GE uses to gauge employee satisfaction... the statements would need to be altered, ultimately though that is what we are looking to learn... how satisfied are our members and what is important to them!
  6. Special attention should be paid to volunteer services, i.e. structure, benefits, recruitment, development, etc.
  7. Reach out to individuals, companies, and organizations not currently involved with the Chapter to gauge their perception of the organization to what we would need to do/be to attract them to the organization.

### Topic #2: Membership and volunteers. Ways to address Board concerns related to membership and volunteers.

#### Volunteers

- Create an easy, quick, and nimble protocol for processing volunteer sign ups and participation
  1. Within one week, new volunteer application is received and the volunteer is contacted for an interview. Interview reveals volunteer strengths and time commitment within another week, volunteer is contacted by VP of area of interest to work, and start working with volunteer.
  2. Make volunteering easy! Easy to find volunteer opportunities, easy to know what you will be doing and the time commitment, clearly defined tasks, etc. Make it easy for board and directors to get access to the database.
  3. Complete an inventory of all volunteer positions/needs within the chapter... analyze where we have duplication, too many layers, etc.
- Develop volunteer contact and activity list; verify continued interest; identify

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interests/strengths; connect with new opportunities if necessary

- Hold volunteer summit to collect data and create an improved system.
- Research other Chapters and find out what's working for them
- Query existing and past volunteers to understand volunteer experience.
  1. Conduct exit interviews
  2. Undertake confidential interviews (should be completed by people without prior experience/history)

### Members

#### New Member protocol

1. New members are contacted within a month of them becoming a member and anyone who wants to volunteer be specifically contacted about what's available
- Need to clearly define who we are, who we serve and have a system in place to be nimble and responsive.
  - Survey membership to identify what they want/need most (and whether they are willing to help create support their wants/needs). Include the option that members may prefer to be silent/non-participatory. Then determine how we lead/manage/engage volunteers to meet those goals.

### **Topic #3: Structure and organization of the chapter. Ways to evaluate current structure and identify alternative approaches to chapter organization.**

- Review board positions and org structure to see if we can create a more welcoming, nimble, flexible, simpler, and responsive leadership model; determine what each position is and if it's necessary
  1. Consider having a small leadership team and the high level positions (like the VP of Programs and VP of Interest Groups) NOT be on the board)
  2. Directors + Board Chair (or President); President-Elect; and key committees led by committee chairs. Create "generic" board seats that enable newer directors to become oriented to Board service (they can serve as "helpers" on committees, and evolve into leadership roles). (This is a really common structure for corporate and non-profit boards).
  3. Offer tasks rather than titles. Have functional teams (or committees) to provide greater flexibility. Perhaps each board member should take responsibility for a monthly program until we are staffed adequately.
- Determine who we want to be - what, when, how, who needs to come first. Step back and take a holistic view before we just do. Do our mission, vision, and values still make sense? What data do we have that supports this? What do our members and non-members have to say? Do a little market research to understand and possibly some benchmarking. From an organizational development and design focus, this understanding of mission, vision, and values drives all decisions and makes decisions much easier. This does not need to take

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much time if facilitated well. Based on this we can move to structure, skills, leadership, and volunteer staffing.

- Continue the expectation and conversation that every board member and volunteer will be welcoming and excited to be a part of the organization.
- Do a task analysis of all needed board activities, prioritize them, determine what resources are available to do the work NOW, and then scale activities to match resources. Complete a task analysis to simplify and more equally distribute workload of board members and volunteers throughout the organization.
- Convert the Business Manager position into Executive Director.
- Research how other ASTD Chapters and like organizations structure their leadership teams.

### **Topic #4: Ways that the chapter could foster emotional connections that enhance member/volunteer engagement. How can we support/advance connections (and engagement) with the chapter?**

- Review all communications for inclusive tone and language (after data review)
- Continue to verbally highlight the importance of welcoming energy, smiles, being a gracious host, tone, saying thank you, etc for all board members and volunteers. Continue to point out how important these things are.
- Identify volunteer roles that don't require large commitments of time or big responsibilities.
- Communications: A quarterly newsletter/blog could offer a sense of continuity (one that goes to all members).
- Look for ways to connect members (and others receiving our communications) with participating members, i.e. incorporate member and volunteer spotlights into monthly newsletters, volunteer testimonials, etc.
- Identify and promote benefits of volunteering and participating in the Chapter.

### **Topic #5: Programs - Support/advance/continue programs**

- Review member feedback and plan all programs in response to member priorities; ensure alignment with ASTD competency model
- Recruit a good leader to be VP of Programs
- Board members step in as a team to ensure critical activities are completed; brainstorm topics; partner with others
- Plan for at least one 'monthly' program to include online participation