

Communications Strategies For High Performing Volunteers

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Introduction

Welcome to the course on *Communications Strategies for High Performing Volunteers*. These strategies involve more than just an understanding of your fiduciary responsibilities as a board member of a credit union. More importantly, they also involve learning how to be effective and efficient as a board member and as a complete board of directors.

In this course, we'll study the relationships between individual board members, and the relationship they hold with the CEO. We'll look at various aspects of engagement as a board member and as a full board. We'll discuss how that engagement adds to your overall leadership role for your credit union, for your board of directors, and for the CEO that you oversee and evaluate. We'll also talk about your leadership role on behalf of the members that you represent on the board of directors.

Objectives

The objectives for this course are to:

- Explain how a modern, competitive board differs from a traditional board;
- Identify guidelines, or best practices, for board governance;
- Explore the effectiveness of your board and how to improve it;
- Discuss the elements of a competitive board; and



- Describe the levels of board engagement and how to build a more engaged board.

The Traditional Board

The traditional board in the past and sometimes in the present continues to act on these ideas:

- Seniority is the name of the game.
- Tenure is earned.
- Presentations are scripted and Robert's Rules of Order were definitely followed.
- Rigid agendas are followed and management comes to the board of directors with agendas.
- The board is run by the experts. Management comes to the board of directors as the experts. Management gives the board an education on how the business at hand was working and how it might best be worked. Management needs the approval from the board to move forward with their agenda, and so that they can continue to run the organization as they see fit.

The Modern, Competitive Board

A lot of the direction for the modern, competitive board comes indirectly to credit unions from the Securities and Exchange Commission (SEC). Several years ago some of the corporate board shenanigans that happened with companies such as Tyco, WorldCom, and Enron. Because of those problems the Gramm-Leach-Bliley Act was passed, which dictated how boards of directors for publicly traded companies must act.

Many of the lessons and requirements that come from those regulations from the SEC for publicly traded companies are applicable to any board of directors. Participation is expected with the modern, competitive board and expected right away. The traditional board told you to sit back for a couple of years and keep quiet. You couldn't chime in until you earned some stripes, and earned some tenure.

Today's modern board has participation expected of every board member from the moment they take their oath of office on the board of directors. Whether you've been on the board for ten years or for ten minutes, participation is expected in an equitable fashion regardless of seniority and tenure.

You'll read that markets are watching boards. Obviously, the stock markets are watching publicly traded corporations and how they are



governed. They watch how boards are engaged in conversations and how they set policy. But do markets really apply to credit unions? The answer is yes. Your markets are your members – where they deposit their money, where they borrow their money, and the financial institution they choose to be a part of. Your markets are also your committees as they look to local organizations to help their communities grow. You are expected to be a vital part of the community, a valued, trusted business partner in your neck of the woods – whether it's a city, county or general region.

What other features apply to the modern, competitive board?

- **Deliberation, dialogue and resolution** are not just expected of the modern competitive board. They are required. To be more effective, boards, teams, or any group of professionals must have honest, candid, and spirited deliberation of the issues in their meetings. This includes deliberation of matters that affect the success, and perhaps the demise of the organization and of the product or the division. With that deliberation, there must be dialogue from