Annotated Agenda

**Identifying and Testing Volunteer Leaders**

**TIME ALLOTTED: 45 Minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector / PPT
* Butcher paper & markers

**GOALS:**

* Identify skills and qualities that make effective leads
* Discuss effective ways to develop leaders within your chapter
* Learn best practices for creative testing

**AGENDA**

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| **0:00 – 0:06** | **Introductions** | |
|  | 0:00 – 0:03 | Personal Story   * **[Slide 1]** [Trainer should give a two-minute version of their personal story as relevant to this module. Don’t forget to share challenge - choice - outcome and practice it like any other section! It’s especially important with this module that those three elements of your story are clearly identifiable and that your story is no longer than two minutes.] |
|  | 0:03 – 0:05 | Introduce session and goals   * **[Slide 2]** As a grassroots organization, OFA will only succeed if our volunteers are empowered and take leadership within our organization. * This session will review the fundamentals of identifying leaders and providing them with support to develop. * Coming out of this session, you will:   + Identify skills and qualities that make effective leads   + Discuss effective ways to develop leaders within your chapter   + Learn best practices for creative testing |
|  | 0:05 – 0:06 | * **[Slide 3]** Here’s a breakdown for what we have planned for the rest of the hour. [Trainer will give brief synopsis of each agenda item]   + Introductions   + Leaders in Snowflake   + Investing in Potential Leaders   + Testing   + Debrief |

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| **0:06 – 0:15** | **Leaders in Snowflake** | |
|  | 0:06 – 0:09 | Intro to snowflake   * **[Slide 4]** If a grassroots-led organization is to succeed, it is essential to have a structure that can support leadership at all levels. * One leader with too many responsibilities will be unable to guide a successful chapter, while too many leaders with undefined roles can create chaos. * Within OFA, we use a snowflake structure to organize our leaders. Has anyone heard of the snowflake structure before? [Discussion on snowflake.] |
|  | 0:09 – 0:15 | Roles within a chapter   * **[Animation cue]** * Here is an example of a fully formed chapter with all of the possible leads. Chapters are in different stages of development, but let’s look at this ideal example and break it down. * At the center of this snowflake is a Chapter Lead. [Describe the role of the Chapter Lead.] * What kind of skills would a Chapter Lead need to possess? * [On butcher paper, create two columns with “role” on the left and “skills” on the right. Ask for suggestions from the crowd on skills that are required.] * Great! What about an issue lead? [Describe the role of an issue lead.] * What kind of skills would an issue lead need to possess? * [Pick examples of the other kinds of leads. Describe their role in the chapter and get required skills from the crowd.] |

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| **0:15 – 0:21** | **Investing in Potential Leaders** | |
|  | 0:15 – 0:18 | Finding prospects   * **[Slide 5]** Like most volunteers, potential leaders will not come up to you, introduce themselves, and immediately take on leadership roles. * A potential leader is often someone that just wants to be involved in the organization. * **[Animation cue]** You may also notice that someone in your network has an inclination for a particular skill. * **[Animation cue]** However you find the person, the 1:1 is the best way to find out what role will be best for that particular volunteer. * Who remembers some of the best practices of a good 1:1? [Facilitate brief discussion on 1:1’s.] |
|  | 0:18 – 0:21 | From prospect to confirmation   * **[Slide 6]** Through that initial 1:1, you can often see if someone has leadership potential. Don’t expect them to be experts at any particular organizing skill. But you can see if they have the enthusiasm and time commitment to take on a larger role. * The next step in developing a leader is having that volunteer tested. Don’t think of this as a complete judgement on someone’s capacity to volunteer. It’s really just seeing if a particular role is a good fit for the person. * Finally, after a volunteer has proven they have the abilitiy to succeed in a particular role, you will want to have another 1:1 with them. This escalation 1:1 will outline the responsibilities of the leadership role and empower the volunteer to take ownership of that part of the organization. |

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| **0:21 – 0:40** | **Testing** | |
|  | 0:21 – 0:24 | What makes a good test   * **[Slide 7]** We’ve already covered what makes an effective introductory 1:1 in an earlier session, so let’s think about the second part of that leadership development process: the test. * **[Animation cue]** A good test will have a specific action. This could be anything from recruiting and running a phonebank to leading a training on grassroots fundraising. * **[Animation cue]** The test will also approximate what kind of responsibilities might be expected of a volunteer in a particular leadership role. * **[Animation cue]** Finally, the test will ask the volunteer to use skills that will be vital to the success of someone in that position. * **[Animation cue]** Tests will look different for the various roles within the chapter. Use the requirements of the role to guide you toward the most appropriate test. |
|  | 0:24 – 0:27 | Sample tests   * **[Slide 8]** I think a few examples will highlight what a good test will look like. Let’s look back at the list we made when we examined the snowflake and determined the skills required for some roles. * What kind of test would be best suited to find a good Chapter Lead? * [Take suggestions from the crowd. Go through each listed Lead and find an appropriate test.] |
|  | 0:27 – 0:28 | Other tests   * **[Slide 9]** [Faciliate discussion on some other tests that might be good to use, as well as roles that weren’t listed on the previous slide.] |
|  | 0:28 – 0:31 | Escalation and Motivation   * **[Slide 10]** The escalation 1:1 is the third and final piece of this development process. * A leadership role can often be time consuming so it’s important to strike the right balance between outlining the many responsibilities of the role without overwhelming the volunteer. * **[Slide 11]** Motivation plays a big part in whether someone decides to take on a bigger role within the organization. * In what ways can we help our volunteers and supporters take on these roles and succeed within them? [Facilitate discussion]. |
|  | 0:31 – 0:40 | Group Breakout   * **[Slides 12 – 15]** Next we’re going to get into small groups and describe a scenario of a volunteer within the testing process. [Divide crowd into small groups]. * Each group will be assigned one of three scenarios. I want you to think about two things that you will share after our breakout ends: what part of the testing process is this volunteer in? & what would I do to continue their development? * Also, use your personal experience as a guide if you encountered similar situations in your time as a volunteer. * [Give each group 5 minutes to discuss scenarios.] * Great, let’s come back together and see what we’ve come up with. [Facilitate discussion on each scenario.] |

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| **0:40 – 0:45** | **Debrief** | |
|  | 0:40 – 0:41 | Q&A   * **[Slide 16]** [Take questions or any material that was put in the parking lot for later.] |
|  | 0:41 – 0:45 | Review goals   * **[Slide 17]** Let’s see if we accomplished our goals for this session:   + Recognize attributes of effective leads   + Learn method of developing leaders   + Find creative ways to test potential leaders * Did we accomplish our goals? Let’s see a thumbs up, thumbs middle, thumbs down on whether we met these goals. * Great! This testing process should not feel like an extra task that you need to accomplish as part of your organizing. It is built in to the tasks that you are already doing. * Remember to think creatively about using tests in order to develop leaders that can help grow our organization. |