

Carol's Recipe for Success: 3 Musings Before Starting A New Role

Blog
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In May 2014, I hopped a province. I relocated to Vancouver from Edmonton eager to bring my experience as a community builder, board member, volunteer and executive director to a new city, role and organization. And, wow, I am excited to join Vantage Point as the new(ish) Director of Learning - I joined this passionate team in October.

Immersing myself in my previous roles was an intensive, hands-on way to learn about the complex day-to-day necessities of leading a not-for-profit organization. Yet, like many others there were times when I struggled. What were others expecting of me when I was at the board table? How could I make a meaningful difference when I was volunteering? As an Executive Director, how could I best engage my board in the dance of co-leadership?

Oftentimes, knowing how and when to contribute is not always as straightforward as looking to your spot on the organizational chart. There's a lot of improvisation and ambiguity involved in bringing a role description to life. Largely that ambiguity happens for good reasons: we work in an incredibly dynamic, complex and challenge-positive sector.

Here are three things I've learned that I now use before stepping into a role, whether as a volunteer, a board member or staff person:

- **Appreciate the unique operating culture of the organization you'll be working with.**

Some organizations are more formal than others, and treat the work of board members, volunteers, and staff as completely distinct and separate. These organizations tend to emphasize adherence to job descriptions and policy manuals. Others prefer a happily messy mix of contributions from volunteers and staff. Knowing where on this spectrum your organization falls will equip you with the foresight to know how best to get involved and in what role.

- **Know your leadership philosophy, personal strengths and working style.**

For example, I see myself as a collaborative leader with a passion for strategy, long-range planning and learning new skills. I prefer to work with teams to vet ideas and set direction, but I like to work on my own to execute them. I am not the sort of leader who likes to manage existing programs or thrives working in the fiduciary mode of governance. That's helpful for me to know, and to share with potential collaborators.

- **Understand the lifecycle of your organization.**

There have been volunteer roles I have chosen to step away from because of a misalignment of my leadership style and their lifecycle stage. In one instance, I was on the board of an organization where programs were in decline, but had an infusion of financial resources to try new strategies and execute a turnaround. While there was great opportunity for renewal of programs, the board struggled with wearing their governance hats. Often, board meetings were marked by a high degree of conflict and a drift into operational matters. While I initially felt guilty about stepping away and letting the organization down, I later recognized that if I wasn't fully engaged, I was not helping the organization simply by occupying space.

What's your recipe for success? What are your steps to ensuring you are engaged and making a meaningful difference as a leader?