LEADERSHIP DEVELOPMENT

O V E R V I E W

O4U OUT FOR UNDERGRAD

O4U's Leadership Pathway

IMPACT ON O4U COMMUNITY

- Board of Directors
- Advisory boards
- Conference Director/Co-Director Strategic Operations Team Lead
- Lead Role on Conference or Strategic Operations Team
- Service on Conference or Strategic Operations Team
- On-going Volunteerism
- Campus Ambassador
- Conference Attendee/ Student
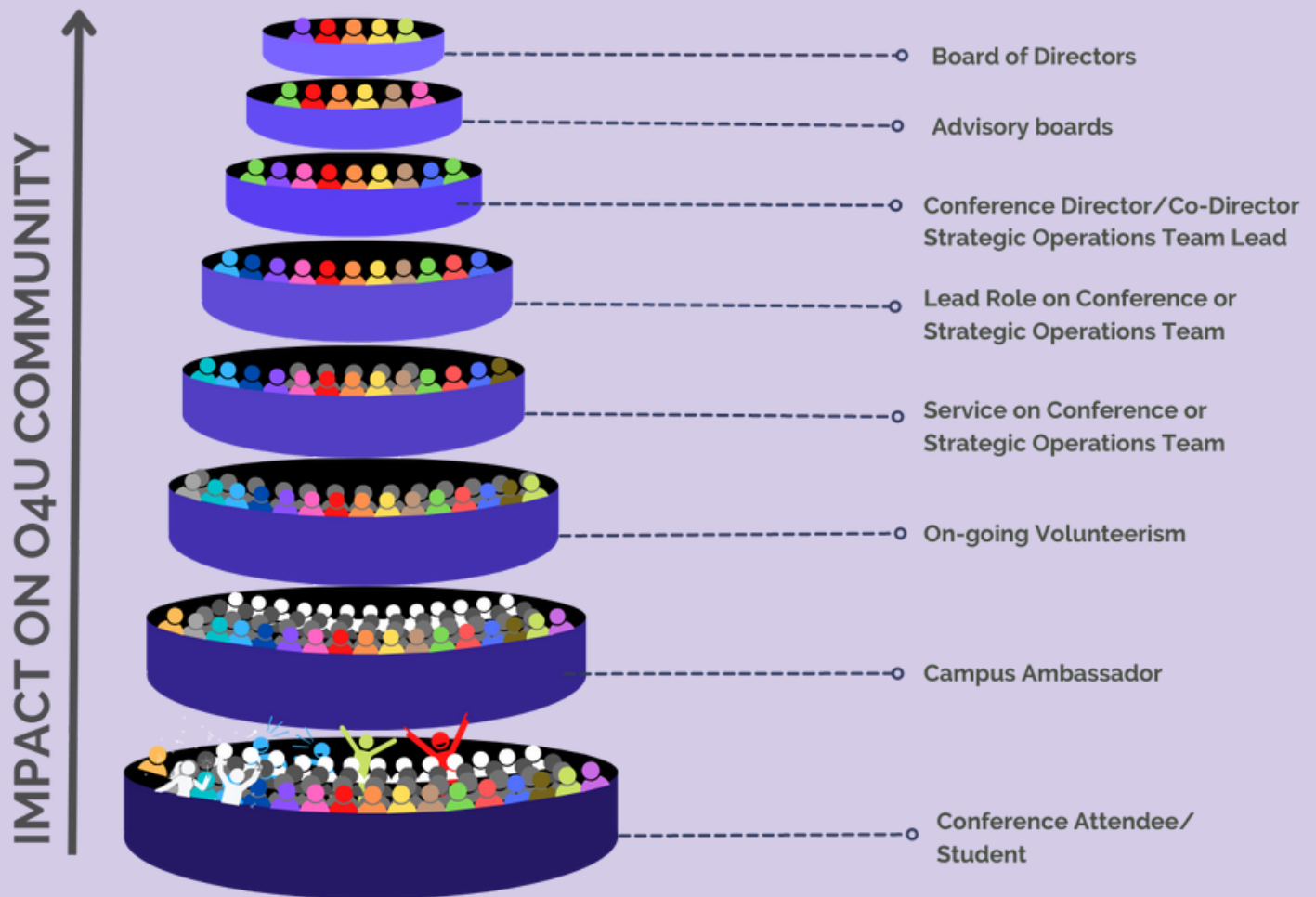
O4U's Leadership Pathway

Since O4U's founding in 2004, its Leadership Pathway has been based on identifying potential leaders and creating opportunities for leadership development in students and volunteers through four separate, but related processes.

1. Identifying and recruiting high-potential LGBTQ2+ students to attend conferences

2. Identifying and appointing campus-based Ambassadors to promote O4U to students

3. Identifying, recruiting, and developing high-performing, early-career-stage volunteer leaders to design and execute personal and professional development conferences and other resources for high-achieving LGBTQ2+ undergraduates

4. Identifying and creating sponsorship opportunities for corporate recruiters who are committed to hiring LGBTQ2+ undergraduates for internships and jobs and serving as mentors.

> "The old concept of a career ladder running from the mailroom to the executive suite could be replaced by something much more ad hoc and flexible. Some 42 percent of Gen Z workers value work-life balance, remote working and flexible leave as their top priorities when looking for a job"

(www.zurich.com/en/media/magazine/2022/how-will-gen-z-change-the-future-of-work)

Executive Brief

Out for Undergrad's mission is to help high-achieving LGBTQ2+*
undergraduates achieve their full potential.

Since 2004, O4U has designed and produced high-impact personal and professional development conferences offering full scholarships and mentoring to more than 8,000 students.** Participants consistently say these experiences are life-changing.

A lesser-known O4U success story is its extraordinary, almost 20-year record of developing leadership capacity and skills in more than 1,000 early-career-stage professionals. Individuals who volunteered to build and host O4U conferences, manage strategic initiatives and operations, run task forces and advisory councils now work in corporations throughout the world where they have opportunities to support voice and agency for others and to model inclusive and empathic leadership.

Structurally, the O4U organization is flat with only two full-time employees. Each year, however, an average of 100 volunteers create and produce all O4U experiences including conferences, year-round mentoring, O4U's Breakthrough Speaker Series, Learning Community, alumni community and more. Volunteers are given opportunities to manage revenue and expenses in a way that can make or break O4U's financial foundation. They interact with senior leaders in over 200 of the world's leading corporations and persuade them to invest in sponsorship of O4U. They also develop robust programming that engages industry leaders and social activists from around the world. In so doing, each of those volunteers participates in what is informally known as the O4U "classroom to the boardroom" leadership development and succession planning process.

The developmental process of identifying potential leaders and supporting them in continuous learning draws from Social Constructionist and Adaptive theories of development explained in research by Garavan et al (2015).*** Each level and type of volunteer participation is designed to support individuals in building capacity for effective and empathic leadership while also building personal resiliency, authenticity and clarity about what matters most in life and work.

*LGBTQ2+ is utilized to represent Lesbian, Gay, Bisexual, Transgender, Queer, Two-Spirit and otherwise diverse individuals
**Please see the appendix for 2022 conference attendee demographics
*** Garavan, T., Mcquire, D. Lee, M. Reclaiming the "D" in HRD: A Typology of Development Conceptualizations, Antecedents and Outcomes, Human Resource Development Review 14(4)September 2015

Executive Brief, Continued

Such a development process may be effectively described as a collective, social process that leans heavily upon (1) adaptive leadership experiences performed in situ, (2) addressing real-world problems of diversity, equity, inclusion, and social change, while (3) incorporating many of the complexities experienced by today's leaders in corporate settings, and (4) encouraging deep introspection about one's own authenticity, values and inclusive behaviors.*

The majority of O4U's intentional leadership development currently takes place during the creation and production of experiences for the students the organization serves. Volunteer organizers describe their own experiences in many positive ways— **life changing, an opportunity to be authentically themselves, and a space to network and make friends for life.**

These are the outcomes of a deliberate structure that cultivates balancing risk and reward, building trust and effective teams, creating a sense of belonging and purpose, and developing radical empathy.

*Garavan, T., Mcquire, D, Lee, M. Reclaiming the "D" in HRD: A Typology of Development Conceptualizations, Antecedents and Outcomes, Human Resource Development Review 14(4)September 2015

The Volunteer Experience

O4U volunteers describe their experience in this way:

"O4U throws you into the unknown to do what you have not mastered or perhaps even attempted before and they trust you. You are given a lot more responsibility than you will get at your job at this stage of your career."

"There are no guarantees of success when a leader is given the opportunity to develop 'on the job' at O4U, but it's precisely through these sorts of challenges that I learned most quickly and powerfully. There is always a safety net in that the leaders who recommend the leaders for the next conference season have done the work of creating a successful conference. The past leaders could always step in and complete a conference development process. But, they never really have to do so."

"At O4U, it is all about the team, everyone pulling their weight but also being willing to support and give cover when people need it. O4U leadership development does not focus primarily on one individual as it has to take into account all of the social interactions that take place in a dynamic environment with teams as talented, intense and competitive as some of our people can be. We are committed to inclusion, so we can't leave someone out or behind because they have a different style of communication. We have to bridge that difference and value it because it makes us stronger."

Whiteboard, White Knuckle

The success of this "whiteboard/white knuckle" approach taken by O4U leaders aligns with "ongoing research with senior leaders in 25+ organizations across the U.S. ... painting a compelling yet simple picture of the most effective leadership development strategy. When asked how their own managers or mentors helped them to grow the most, the number one response from executives is some permutation of 'took a risk on me,' with more than 90% of those polled citing this as a pivotal development experience."*

O4U volunteers, like those executives, progressed to the opportunity to lead. In the corporate world, there exist clear tracks of increasing responsibility and promotion, whereas the O4U progression begins in a classroom on a college campus. The majority of O4U volunteers attended an O4U Conference as an undergraduate student, and a percentage of them went on to serve as O4U Campus Ambassadors at their home universities.

Upon graduation, past conference attendees are eligible to apply for consideration as a volunteer on a conference team, a Strategic Operations team, the Alumni Engagement Ambassador Program, or on-site during a conference. Active volunteers may re-apply each year if they wish to continue service, but no more than 50% of any one team may return.

Imposing that cap has created space for new cohorts of leaders to join the conference teams each year, helped ensure progress towards the goal of volunteer diversity reflecting stakeholder diversity, and allowed for the preservation and utilization of institutional memory. Individuals who re-apply but are not again appointed to a conference team may be considered for Strategic Operations Teams, Advisory Councils and Boards, Task Forces, and/or may choose to participate in O4U's alumni community.

*A Review of Leadership Theories: Identifying a Lack of Growth in the HRD Leadership Domain July 2018 European Journal of Training and Development (https://www.researchgate.net/journal/European-Journal-of-Training-and-Development-2046-9012)

Choosing Leadership

Typically, Conference Directors emerge from conference teams. The serving Conference Director(s), the Chief of Staff, and the Executive Director evaluate team members' history, efforts, responses to challenges, and results during the year. One-on-one meetings, team meetings and projects provide opportunities for observation, feedback, and additional resourcing.

After each year of participation, the observers can generally assess team members' readiness for new leadership roles such as a switch to a different responsibility on a team, assumption of team leadership, or a move to a new team with either more or less responsibility. If no leaders can be identified from within the conference team, external application and recommendations are utilized.

It is quite common for Conference Directors to identify and recommend their potential successors well in advance of the formal application process for the consideration of new leaders. Their recommendations are taken into account in final appointments deliberations.

The Executive Director then reviews a final slate of candidates for leadership roles, including recommendations from the past leadership, and determines a final selection for team leadership. Appointments are also made with mindful consideration of optimizing diversity across all Board-established metrics.

Cultivating Leaders

O4U develops deep and enduring bench strength for the majority of its volunteer positions by combining two practices—succession planning and leadership development.

O4U's founders gathered 50 students and 12 sponsors at Stanford University in its first year. The next year, several of those first 50 students volunteered with some of the founders in convening a second conference. Over time, Conference Team volunteer roles delineated into programming, sponsorship and admissions. Up until 2018, it was generally held that prior service in each of those areas was a necessary qualification for a Conference Team position. While it was logical that volunteer leadership would rise organically from the pool of conference graduates, the consequence of that expected progression was that a majority of O4U's volunteer leaders were, like the conference cohorts, white, gay, cisgender men.

In 2018, O4U moved to open access for people who might not have served in only some or maybe none of the "expected" roles. O4U then expanded its geographical reach to include students in more public universities across the US, extended service to welcome qualified community college students, and engaged a Board member with community college background. Next, O4U implemented a returner guideline, along with a diversity condition to cultivate institutional memory and leverage experience but with an eye to maintaining diversity within each cohort.

To address the resulting increase of less-experienced volunteers, O4U ramped up resources, training and support including access to online platforms for collaboration and business processes. Additionally, many senior leaders were encouraged to join Strategic Operations Teams and to work on Board adopted initiatives.

In these ways, O4U not only supported emerging leaders by employing retained expertise and institutional memory, but also created opportunities for leadership development and service beyond what had been previously available.

> "I think leadership, if I were to bring it down to one idea, would probably be influence. I think somebody who exhibits the ability to influence people or an organization to move in a certain direction.... That is a leader, not necessarily someone who is given the title…[it] is not something that is just automatically awarded or earned. But I think it's something that is kind of built-in and there's a lot of trust that's involved." - O4U Volunteer

Strengths and Vulnerabilities

It is important to note the strengths and vulnerabilities that these individuals brought with them to their first O4U experience, typically as a conference attendee, and how these inform their success and challenges as graduates of O4U. O4U takes it as a given that every individual brings their own unique strengths and vulnerabilities to their first O4U experience, and that participants' successes and challenges both during and after their active O4U involvement are necessarily informed by their individual differences. That said, it is important to note a few factors that have near-universal impact.

The LGBTQ2+ undergraduates who are admitted to O4U conferences are high-achieving and already perform well in both academic and in co-curricular activities; however, and this is as much the case in 2023 as it was in earlier decades, they express fear about being out in corporate America. And even though their life stories demonstrate resiliency and grit equal to and often beyond that of peers who do not suffer the effects of marginalization, bias, discrimination or exclusion based on minority identities,* their concern is justified.

Almost half (45.5%) of LGBTQ2+ workers report having experienced some form of unfair and identity-based treatment at work at some point in their careers, including harassment, termination, or hiring discrimination. About half of all LGBTQ2+ employees are not out to their supervisors and one-fourth are not out to anyone at work.

Students come to O4U for support in bridging the transition from campus to corporate offices. Most of them hope to get great internships or jobs in Fortune 500 companies, the majority of which support LGBTQ2+ employees with inclusive benefits. Even so, openly LGBTQ2+ corporate leaders are rare. Just 26 of the 5,670 (0.5%) of the Fortune 500 board seats are held by openly LGBTQ2+ directors. O4U hopes to move this needle not only by preparing high-achieving undergraduates to live and work with confidence and authenticity, but also by supporting a leadership development process that extends beyond conferences and offers opportunities for continuing growth.

O4U's developing leaders participate in OutNext and OutQUORUM, programs produced by Out Leadership - one of O4U's strategic partners and with whom we will co-publish Out to Succeed 2.0 - and hopefully, they will eventually take seats at the table in the Boardrooms of America where their thought leadership will help catalyze sustainable change in the means and methods of support for LGBTQ2+ people in the workplace.

*Journal for the Study of Postsecondary and Tertiary Education, Volume 5, 2020. Perseverance Despite the Perception of Threat and Marginalization: Students' High Grit in Grad School and Implications for Equity, Diversity and Inclusion in Higher Education. Kundu, A., Elcott, D. Foldy, E., Winer, A.

Development Process

The support embedded in O4U's leadership development process is informed by the scholarly review of leadership theories and implementation of best practices. Furthermore, individuals who continue advancing in their volunteer efforts with Out for Undergrad are provided training and experiences in a variety of areas including, but not limited to, strengths exploration, effective teamwork, communication, conflict resolution, presentation skills, diversity, equity and inclusion, anti-racism, and intersectionality.

Additionally, the continuous cycle of succession planning in which all O4U teams engage—a full overview of our team structure and volunteer biographies are available at www.outforundergrad.org/meet-our-team —affords developing leaders ongoing and varied opportunities to cultivate experience and hone skills.

This process is further enhanced when O4U seeks new members of the Board of Directors, where the highest level of accountability for the organization resides. Three additional strategies are added to succession planning, informally known as "prequalifying," "sponsorship," and "invitation."

Prequalifying potential Board members includes a review of current and past volunteers and external individuals in relation to diversity, capabilities, and the current culture of the Board membership and operations.

- Diversity in this context refers to the degree to which the identity(ies) composition of the Board reflects that of the organization's stakeholders.
- Capabilities suggest that the Board has the skills and proficiencies to advance O4U's mission.
- Culture means that the members of the Board, collectively and individually, can advance the philosophy and principles of O4U's leadership development and ethos of volunteerism.

Creating a Board

To advance O4U's Board composition objectives, diversity, capabilities, and culture must be kept in mind and prioritized according to need (for example, sometimes diversity will be more important than skills or adding former organizers will be more important than both).

Once potential Board members are identified, a decision is made, via consensus, by the Board to champion a specific candidate who possesses unique qualifications and who is viewed as a great potential fit for the Board. This is the preferred path for former volunteer leaders. Once such a candidate is identified, a Board member is assigned to sponsor that individual, and the candidate is afforded several exposure opportunities over a period of 6-12 months to explore:

- When is an appropriate time for this person to join the Board?
- Does this person grasp the organization's strategic direction and understand the commitment and obligations of being on the Board?
- Is Board service the most fitting way for this candidate to continue contributing to the community?
- Does this candidate advance O4U's Board composition objectives?

When the period of sponsorship concludes, the Board decides whether to issue the candidate an invitation to join the Board. It is expected that the sponsorship process will produce approximately 75% of the individuals who are to become Board members, and that approximately 75% of sponsored candidates will eventually be invited join the Board.

It is also expected that the O4U Board will, in some instances, decide (via consensus rather than formal vote) to invite individuals who are not and have not been in sponsorship to apply to join the Board. This is the preferred path for experienced candidates from industry, and those who are more advanced in their career. Further, this method is a lever the Board can utilize to address Board composition needs with relative quickness and to provide a more robust slate of candidates for consideration during Board candidate interviews.

Conclusion

O4U's unique leadership development process and storytelling method of preserving institutional memory have successfully maintained cultural cohesion even in the face of major changes over 20 years of operation. The pandemic tested O4U's resiliency and created new stories about what it means to be a volunteer leader or staff member. The safety considerations alone generated more written policies and "rules" than O4U had applied in the entirety of its pre-pandemic history. Even as COVID-19 was creating disruption in every aspect of society, O4U student and volunteer cohorts were supporting one another in an intentional process to grow and further develop.

O4U will continue to grow and navigate even more transformations in the future. The organization has also shifted in its need for and support of collaboration as teams, student cohorts, and sponsor numbers have grown. In doing this, we have preserved the leadership development experience for volunteers while providing more cross-conference and cross-organizational collaboration, the integration of more administrative support, and more collaboration with the executive office.

Additionally, we must anticipate are the evolving expectations of our volunteers regarding leadership and leaders they will choose to follow. In the past 5 years, research shows that:

> **"Millennials and Generation Z have... developed a distinct and overlapping value system that has shaped their perspectives towards leadership effectiveness. America's youngest working cohorts value leadership that is influential, results-driven, and service-minded: leaders are emotionally intelligent. (They value) leaders (who) prioritize their team's needs and operate with transparency and consistency in communication. (They want) leaders (who) operate using an authentic 'leads by example' mentality and praxis that gains genuine buy-in and loyalty in the process."***

In order to sustain its outstanding legacy of volunteerism then, O4U will need to adapt its leadership development process to both incorporate leaders who possess such capabilities and to foster growth in those directions. This overview can be thought of as the first chapter of an on-going narrative about O4U's impact on people's lives and the foundation of magnifying that impact in the future. Additional context can be drawn from the lives of O4U graduates and written, as it were, by accessing their stories. The O4U Alumni Newsletter regularly includes Alumni spotlights; individuals can subscribe to the newsletter and view past spotlights at www.outforundergrad.org/alumni.

APPENDIX

Additional References

The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World by Linsky

Leadership theory : cultivating critical perspectives by John P, Dugan Jossey-Bass, San Francisco, CA, 2017

https://www.instride.com/insights/how-to-develop-leaders-in-your-organization/

https://krjohnson.ci.unt.edu/sites/default/files/ejtd-leadershipdevelopment.pdf

https://corporatefinanceinstitute.com/resources/careers/soft-skills/emotional-intelligence-quotient-eq/

Leadership development techniques
Mapping leadership development techniques with leadership capacities using a typology of development

John R. Turner, Rose Baker, Jae Schroeder and Karen R. Johnson Department of Learning Technologies, College of Information, University of North Texas, Denton, Texas, USA, and Chih-hung Chung, Tamkang University, New Taipei City, Taiwan

Our Community

1,000+
Students served per year

4
Conferences in 2022

100+
Volunteer leaders serving our mission

313
MOSAIC Students Served in 2022
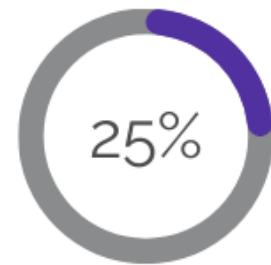
7,000+
Alumni

200+
Sponsors

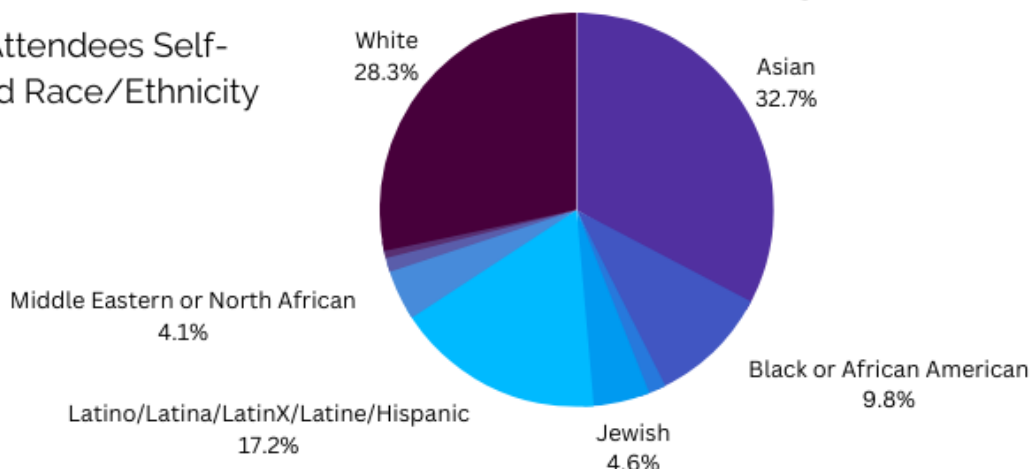33% of attendees identify as first-generation college students

200+
Colleges and universities represented in 2022

25%
Attendees who identify as transgender or gender non-conforming
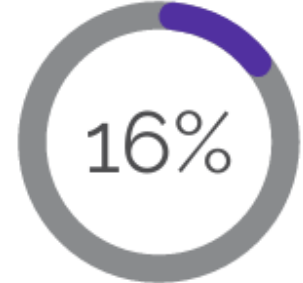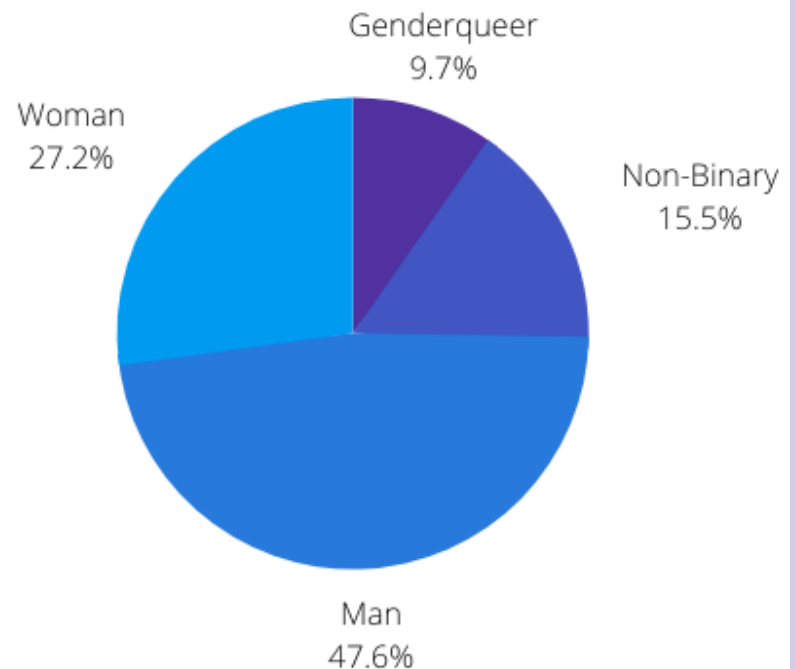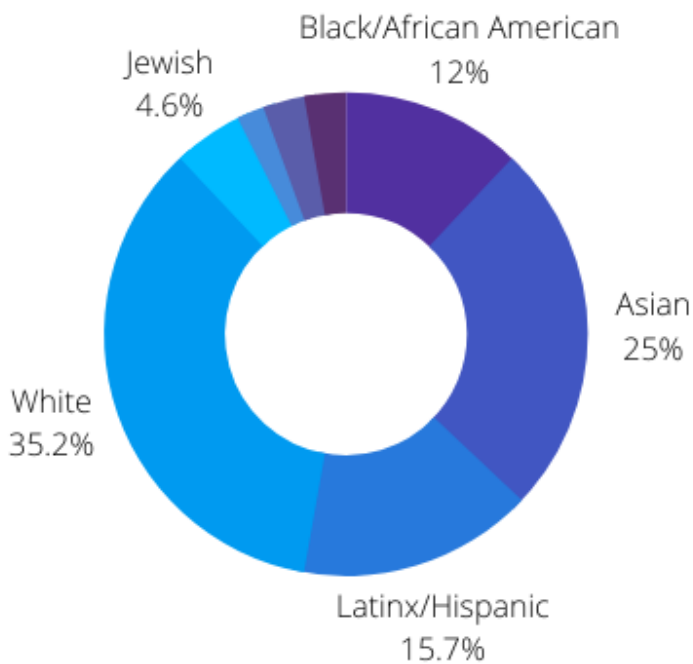
2022 Attendees Self-Identified Race/Ethnicity

White
28.3%

Asian
32.7%

Middle Eastern or North African
4.1%

Black or African American
9.8%

Latino/Latina/LatinX/Latine/Hispanic
17.2%

Jewish
4.6%

Our Volunteers

96 — Current Volunteers

2.9 — Average years as a volunteer

16% — In their first year of service

Ethnicity (donut chart)
- Jewish 4.6%
- Black/African American 12%
- Asian 25%
- Latinx/Hispanic 15.7%
- White 35.2%

Gender (pie chart)
- Woman 27.2%
- Genderqueer 9.7%
- Non-Binary 15.5%
- Man 47.6%

Identify as transgender — 11%

175+ — Average hours volunteered per person per year
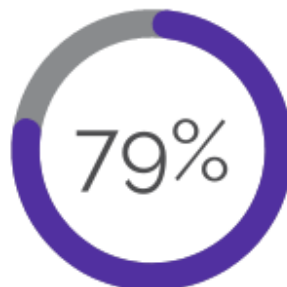
79% — Have attended an O4U conference

90% — Survey response rate

Theories of Leadership

O4U's leadership style best aligns with Adaptive Leadership and Social Constructionist Leadership Theories.

Adaptive Leadership Theory

"This theory was introduced by leadership experts, Harvard professors, and authors Marty Linsky and Ronald Heifetz. [They] concluded that organizations are constantly changing or developing and must be navigated accordingly." "In summary, adaptive leadership can be "summed up using four main principles: distributed leadership, optimal talent mix, possessing a transparent character, and developing mutual trust." "Heifetz [further] defines it as "the act of mobilizing a group of individuals to handle tough challenges and emerge triumphant in the end."

"The following are the four main tenets tied to adaptive leadership:

- **Emotional Intelligence** - This is the ability to recognize your own feelings and those of other people. With this awareness, an adaptive leader is able to build trust with other participants and foster quality relationships.
- **Organizational Justice** - Another fundamental principle of adaptive leadership is fostering a culture of honesty. Adaptive leaders know the best policies to introduce for the good of the organization. They also know the best ways to socialize these changes so that people embrace them. Adaptive leaders are willing to accommodate other peoples' views, hence, assuring them that they are valued and respected.
- **Development** - Adaptive leadership entails learning new things. If one technique is not yielding desired results, an adaptive leader goes out of their way to discover new strategies that can work. With new techniques, [volunteers and students, staff, sponsor mentors and recruiters] at large will experience growth and development.
- **Character** - Adaptive leadership is about having a deep sense of character, being transparent and creative. Adaptive leaders may not always be right, but they earn the respect of those they work with and practice what they recommend."

"Although adaptive leadership requires a great deal of effort, it provides substantial returns. Based on credible statistics, firms that are adaptive end up with immense gains both financially and operationally. They are able to weather storms and rise to the top even during periods of volatility." O4U has done this several times in its history and continued to grow its reach and impact.

Theories of Leadership

Social Constructionist Leadership Theory

This theory asserts that "our understanding of leadership is socially constructed overtime [sic], as individuals interact with one another, rather than being something embodied in individuals or possessed by them." "According to this perspective, leadership becomes a reality when one or more individuals in a social system succeed in framing and defining how the demands of the group will be taken up, and who will address the need for direction in collective action. Through a process of attribution, people agree to assign each other different roles and functions, including the role of leader, to help move the work forward, or to satisfy other social needs (Hunt, 1984; Meindl, 1985, 1995)."

This leadership theory underlies both O4U's founding narrative and the organization's continuing grassroots empowerment of undergraduates and early career stage professionals. "Pushing this idea to its limit, Pastor (1998) views leadership as "'a collective social consciousness that emerges in the organization" ' as individuals interact with one another (p. 5). But Pastor also acknowledges that leadership is not just a mental construct. As this process of social construction goes on, as people develop a shared understanding of the work and the roles assigned to members in pursuing it, leadership takes on an independent life that continues to be enacted over time. In this sense, as it emerges, leadership becomes the property of the social system, rather than being just a shared idea in people's minds."

Development techniques that align with these two theories above are drawn from work by Turner* and colleagues in which they "categorized 500 leadership development techniques and mapped them with previously identified leadership capacities into Garavan et al.'s (2015) development typology. Once mapped, the authors were able to identify the most common leadership capacities and related development techniques for each development domain in the typology." This research provides a tool that O4U has used and may continue to use to identify leadership capacities and development techniques and to create leadership development programs consistent with "the skills, behaviors and traits of leaders and the relations and social dynamics depicted within leadership roles."*

*John R. Turner, Rose Baker, Jae Schroeder, Karen R. Johnson, Chih-hung Chung, (2018) "Leadership development techniques: Mapping leadership development techniques with leadership capacities using a typology of development", European Journal of Training and Development, https://doi.org/10.1108/EJTD-03-2018-0022
Content also adapted from www.wgu.edu/blog/what-adaptive-leadership2101.html#close, https://corporatefinanceinstitute.com/resources/management/adaptive-leadership/, and https://wagner.nyu.edu/files/faculty/publications/Leader.pdf

Development Types & Techniques

Garavan, et al.'s 2015 work identified four development types. Turner, et al.'s 2018 paper mapped development techniques and the most common leadership capacities into each development mode in the typology.

Autonomous Development

"Autonomous development is a process centered on intrapersonal development rather than producing skills of value to jobs and organizations". The development techniques associated with autonomous development include those identified to aid in developing the following leadership capacities: competencies, change, developmental skills, individual personality traits or characteristics, and reflective skills.

Dialogic Development

"Dialogic development is emergent and involves co-participation, mutual consultation, and sensemaking. Individual and context are enmeshed as development occurs". The development techniques mapped to dialogic development were those related to developing the following leadership capacities: coaching/mentoring, change, conflict, culture/diversity/identity, customer service oriented, moral/ethical, organizational learning and learning organization, reflective skills, social skills, and teamwork/team building.

Networked Development

Networked [development encompasses p]lanned development processes that focus on teams, organizations, relationships between organizations, [and on] development as an interdependent intentional process". Development techniques keyed to this area related to organizational and interorganizational development and building leadership capacity in culture/diversity/identity, global orientation, networking, and teamwork/ team-building.

Acquisitive Development

Acquisitive development refers to "[t]he development of knowledge, skills, and behaviors that contribute to personal, professional, job, and organizational resources". Development techniques associated with the acquisitive typology were those tied to increasing leadership capacity in change, conflict, community focus, critical thinking skills, competencies, decision-making skills, developmental, emotional intelligence, entrepreneurism, innovation/creativity, listening/communication skills, management functions, moral/ethical, effective performance/political acumen, problem-solving skills, reflective skills, and strategic thinking skills, as well as building trustworthiness.

O4U's Leadership Development

One can argue that O4U's leadership development process encompasses all the development types that Garavan, et al. addressed, but that the Acquisitive and Dialogic domains are much more prominently featured. Further, mentoring is a major component of O4U's leadership development practice.

The O4U method differs from traditional mentoring in which the mentee and mentor are within the same corporation and the primary emphasis is on pairing for the impact it can have on the organization, e.g. improving competitiveness or reinforcing organizational culture. O4U's program focuses instead on the mentees and on encouraging each one's personal and professional development via a reciprocal relationship with an experienced, LGBTQ2+ identified employee of a corporation sponsoring O4U's conferences.

Key features of the mentee aspect of O4U's mentoring program include their motivation to participate (they do so voluntarily), their willingness to learn, and their goal orientation. Among the mentors, their willingness to share personal experiences as a LGBTQ2+ person in the workplace and their gut-level commitment to the program are particularly noteworthy traits.

Evaluating O4U Leaders

Thriving organizations maximize the leadership potential of their board, staff, and volunteer teams. The journey to maximizing leadership begins with implementing and consistently using systems of evaluation. There are three phases:

Feedback

Giving feedback is incredibly basic, but to be effective or productive, feedback must be clear, focused and provided frequently. "What we sometimes call 'delegation' is often a lack of attention to detail and a failure to follow-through with feedback." Of course, giving feedback should not translate into micromanagement; still it is essential that attention be paid to the work being done and that individuals and teams receive feedback on successes and opportunities for growth.

Goals Review

One or two reasons typically underlie an organizations failure to achieve self-set goals.

First, failure may occur because a goal does not translate from the Board of Directors to the teams executing the work. It may also be the case that goals are either not socialized or poorly socialized because attempts to do so do not fit the organizational culture.

Secondly, failure may result from the organization not tracking progress or not sharing known progress with the broader team. Team members need to know if their work is making a difference; their achievements need to be recognized and celebrated more frequently than their processes and output are simply critiqued.

In forming an O4U-wide goal, the following questions are critical:
- How does the goal contribute to the mission?
  - If the answer cannot be expressed concretely and in a way that makes sense to the organization as a whole, effecting achievement of the goal will prove difficult.
- How will our front-line volunteers contribute to our bottom-line results?
  - There must be clarity as to how the roles/inputs expected from each volunteer team further both the organization's mission and the highly achievable goals set by the Board. They need recognition and celebration of their achievements at a greater frequency than critique.

Evaluating O4U Leaders

O4U conducts regular goal reviews with teams and track progress on a [dashboard](), in addition to meeting with leaders a regular basis to share progress and to learn how organizational leadership can help them to be successful. Further, there are frequent meetings between the Board Chair and Executive Director and the Executive Director and the Chief of Staff to assess progress, risks, needs, and address any concerns.

Annual goal setting takes place within each team with guidance from organizational leadership who align on objectives, budget needs, and plans for collaboration across teams.

Historically, O4U's approach to empowering volunteer team leadership throughout the organizational operations, including goal setting, has been successful because it has provided autonomy and opportunity along with mentoring and support.

Self and Peer Assessment

Volunteer leaders have the opportunity for both self and peer assessment. This also includes conversations with the Executive Director about their successes and areas for improvement (capacity competencies) as well as their character competencies.

The Board has established a process for evaluation of the Executive Director and the Executive Director reviews the performance of the Chief of Staff. The Executive Director and Chief of Staff collaborate on volunteer leader evaluations.

Skills and Competencies

A volunteer leader takes charge and ownership in coordinating projects and programs that build community assets, meet community needs, and provide volunteers with a positive experience so that they continue their journey of service while helping to carry out the mission of the non-profit organization (Jamey Bachman, personal communication, February 9, 2016).

Volunteer Leadership Skills and Competencies*

- Dependable
- Driven
- Possess integrity
- Communication skills
- Ability to network with others
- Resourceful
- Service-oriented Attitude
- Willingness to go above and beyond
- Resiliency
- Ability to motivate
- Ability to encourage
- Identify strengths in other volunteers
- Identifying weaknesses in other volunteers
- Goal-oriented
- Enthusiastic
- Willingness to give of oneself
- Patience
- Organized
- Facilitate participation by local internal and external stakeholders
- Recruit and mentor new volunteers
- Delegate and support team activities to achieve organizational goals
- Dedication
- Commitment
- Willingness to serve
- Lead by example
- Confident
- Knowledge of organization's operating procedures
- Personality
- Intuition
- Leadership
- Compassion
- Meet the needs of other volunteers
- Initiative
- Able to work with minimal guidance and supervision
- Scheduling and related documentation
- Kindness
- Consideration
- Persistent
- Must have back-up plans and incentives for those who volunteer
- Ability to teach
- Positive attitude
- Assessment and Evaluation Skills
- Punctual
- Good Listener

Assessment Measures

Volunteer Leadership Assessment Measures

Based on A Delphi Study, dependability was the most important competency identified by panelists. Patience and a service-oriented attitude followed as also being important competencies for a volunteer leader to possess.

Additional assessment measures include:

- Observations
- Follow-through
- Interactions with other volunteers
- How well they communicate with general volunteer population
- Questioning
- Return rate of volunteers
- Tactical goals that can be measured
- Time spent in leadership role
- Ability to obtain quality volunteers
- Feedback from general volunteer population
- Self-evaluation with a rubric
- Prior experiences
- Interviews
- Confidence in skills taught
- Membership numbers and attendance at events
- Responsiveness of general volunteer population to react to leader's call to action