To ensure their effectiveness, the volunteer and staff leaders in today’s dynamic membership-based organizations must assess their readiness for leadership. Understanding the fundamentals necessary to govern and manage these organizations is a critical first step.

As part of that process, volunteer and staff leaders must learn how to use a systems approach in conducting that evaluation.

This assessment provides an opportunity for volunteer and staff leaders to take a serious look at whether the systems, processes, and practices currently in place are supporting the organization’s mission and goals.

**Suggestions for Using This Tool**

Consider using this tool in the following ways:

- As an assessment tool in preparation for an annual leadership training session or staff retreat;
- As an assessment tool to examine specific program areas;
- As a reference tool for volunteer and staff leaders interested in learning more about how to increase their own effectiveness.

**Key Audiences**

- incoming officers
- strategic or long-range planning committee
- board of directors
- executive director
- professional staff

**Preparation Tips**

Download, print, and copy the four 8.5 x 11-inch pages either double-sided and stapled; or into a folded 11 x 17 booklet.

Consider preparing a cover page that highlights the primary reason for taking this assessment; clarifying the areas needed to ensure the piece reflects your organization’s culture, values and structure.

Contact the Melos Institute if you would like the piece customized for you.
Effective volunteer and staff leaders understand the impact of the changing social, economic and natural environments on their profession, trade, or personal interest. They recognize the importance of continuously evaluating the organization’s systems and operations to ensure they remain responsive to its members.

This is often done prior to our organization’s annual planning effort. This assessment provides our leadership team with the opportunity to examine, explore, and identify those key issues that could positively or negatively impact our ability to achieve our mission and goals.

This is an assessment, not a test. It has no right or wrong answers. It is simply a tool designed to help us focus on our organization’s program areas.

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**Instructions**

The statements reflect the actions of an effective volunteer or staff leader. When reviewing them, consider your own skills in relation to the demands and challenges you expect to be facing in the coming year. Check off those items that your fellow volunteer and staff leaders feel most important to concentrate on during the next twelve months.

Compare the actions selected by other members of your leadership team. Use these identified actions to guide the development of special training sessions during the course of the year. This will ensure your experience is not only valuable to the organization but also worthwhile for your own personal leadership growth.

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**Leadership Development**

In preparation for leadership, we have...

- Assessed and identified our personal strengths and weaknesses as leaders (Contact Melos Institute for a sample).

- Taken steps to strengthen key interpersonal skills, including team-building, negotiation, motivation and public speaking.

- Committed to using a communication style that is open and honest, and that projects a positive attitude of the opportunities available within the organization.

- Accepted our most important role of helping members, understand the advantage that exists for them when they contribute their time, talent and expertise to the organization.

- Taken the time to learn more about our fellow volunteer and staff leaders, thereby gaining a greater appreciation for their talent, skills and expertise.

- Outlined a set of personal expectations or goals that can be achieved as a result of this leadership experience.

- Developed recognition programs that identifies, honors, and rewards members who contribute to the organization’s growth and development.

**Governance & Management**

In preparing to govern and manage the organization, we have...

- Read all appropriate association documents that define our volunteer and staff leadership roles and responsibilities, as well as understand how these positions interact with others to achieve our organization’s goals.

- Committed to identifying, recruiting and mentoring volunteers and other emerging leaders as needed.

- Developed a system with fellow leaders to create a sense of partnership and teamwork based on common goals, an environment that invites involvement and maximizing resources.

- Become well-informed of the economic, political and social factors that shape the environment in which our association is seeking to be successful.

- Reviewed our organization’s plan including mission, goals, strategies and annual work plan.

- Selected our goals as volunteer and staff leaders based on the overall direction and established priorities from our strategic or annual plan.

- Established nontraditional strategies (for example, innovative committee structures) to better manage association projects, ensure volunteer involvement and follow-through, and demonstrate sensitivity to the needs and limitations of volunteer members.

- Sought to improve our association’s overall effectiveness through observation, experience, or exchange of information and techniques with other profit and nonprofit organizations.

- Developed a thorough appreciation of each other as professionals and partners in our efforts to achieve our organization’s goals.

- Encouraged committee leaders to investigate opportunities to promote each other’s programs, products and services in an effort to fulfill our association’s overall goals.
<table>
<thead>
<tr>
<th>Membership Development</th>
<th>Member Services</th>
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</thead>
<tbody>
<tr>
<td>Our organization has...</td>
<td>Our organization has...</td>
</tr>
<tr>
<td>- Sought to develop a membership base that is representative of the profession, trade or personal interest within our defined jurisdiction.</td>
<td>- Established strategies to evaluate the general environment and its impact on member needs.</td>
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<td>- Developed strategies that routinely assess member preferences and their level of satisfaction.</td>
<td>- Evaluated programs, products and services to competitive organizations in the private and public sectors to ensure members are receiving the highest value possible from us.</td>
</tr>
<tr>
<td>- Established and incorporated key messages into our print and electronic materials that communicate the beliefs we hold about our members and the importance of being responsive to their needs.</td>
<td>- Defined a “success or performance measure” (for example, generate revenue, increase attendance) for each association program, product, and service.</td>
</tr>
<tr>
<td>- Positioned our organization to members as a “vehicle” uniquely designed through their involvement to help them achieve their personal and professional goals.</td>
<td>- Committed to using the member profile and other pertinent information on member needs to make decisions affecting current and new programs, products and services.</td>
</tr>
<tr>
<td>- Established a comprehensive membership development program that includes detailed short- and long-term strategies as well as active and passive strategies for prospecting, recruiting, orienting, involving and renewing.</td>
<td>- Made sure that all communication (oral, written and electronic) stresses the benefits of our programs, products, and services, clearly outlining their value from the members’ perspective.</td>
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<tr>
<td>- Demonstrated through leadership actions that members are not customers but citizens of a unique community seeking to address common goals.</td>
<td>- Developed cross-marketing strategies between and among our programs, products, and services in an effort to reinforce the true value of membership.</td>
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<tr>
<td>- Promoted the organization as one that enables members to gain access to critical information and/or contacts through their involvement in a wide variety of projects, activities, and events.</td>
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<tr>
<td>Developed special training programs that prepare member volunteers to be more effective in their membership development efforts (for example, recruiter training, new member orientation, and renewal telethon training).</td>
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<tr>
<td>Created incentive and recognition programs that reward members for their contributions to member growth and involvement.</td>
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Notes:
### Communication and Public Relations

Our organization has...

- Established clear policies and procedures for those volunteer and staff leaders serving as official spokespersons.
- Made use of advancing technology to find new and more effective ways to communicate with, inform, and solicit feedback from members.
- Developed strategies that position members, their industry, profession, or personal interest, as well as the organization in a positive light to the general community and the media.
- Developed clear and consistent policies on the organization's issues and priorities that are well-communicated and serve as a guide when dealing with the media and government.
- Taken pro-active steps to build positive working relationships with other allied groups and the media.
- Developed a credible reputation as being an expert source of information on issues relevant to our profession, trade or personal interest.
- Routinely evaluated our print and electronic materials to ensure they remain timely, provide a balance of information, and offer members a high degree of value.
- Used the following parameters to strengthen the impact of communicating with members and other audiences:
  - Review the member/audience profile
  - Determine the key messages most appropriate to convey
  - Determine the actions members/audiences need to employ
  - Position the message and action within the context of the information to achieve desired impact
  - Identify the most effective form(s) for its delivery
  - Establish measures to evaluate effectiveness

### Legislative and Regulatory Influence

Our organization has...

- Routinely developed and implemented ongoing strategies for informing and educating regulators and legislators at all levels of government.
- Identified key players in the legislative and regulatory community with whom to build long-term, productive working relationships.
- Developed an effective issues management system to identify, track, assess, prioritize, and address critical issues.
- Investigated short- and long-term implications of strategies before taking action.
- Taken both a pro-active and reactive approach to developing strategies that impact the legislative and regulatory process.
- Committed to using "principled negotiation" (an approach that seeks to establish areas of mutual gain) rather than "positional bargaining" as our primary strategy for effectively dealing with opponents.
- Developed a wide variety of political, legislative, and/or regulatory strategies that encourage widespread member involvement.
- Identified and built collaborative partnerships with related groups to better address our issues and challenges.
- Established special programs that encouraged members to take a more active role in the political elective process (for example, assist in fundraising, coordinate candidate campaigns, and run for office).
- Developed a political grassroots effort that mobilize members to act at a moment's notice.

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**Notes:**
### Making an Impact

**Information Required to Support Planning Efforts**

In order to succeed, our leadership team needs to define a clear sense of purpose and direction. This assessment helps us define the areas that our organization needs to focus its efforts on to increase our effectiveness.

Use the space below to create a statement that best describes the problem(s) we are facing in each functional area.

Once defined, write down all the internal and external information related to the problem. Be sure to refer to it during our planning process.

<table>
<thead>
<tr>
<th>Program Area</th>
<th>Root Problem &amp; Related Information</th>
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<tbody>
<tr>
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