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OPERATIONS AND EFFICIENCY

Cultivating Leadership in Lifelong Learning Institutes: A Narrow Bridge

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Lifelong Learning Institutes that belong to university campuses like my own have a special challenge. We walk a narrow bridge, and sometimes it can even feel like a tightrope. The cause of our particular difficulties is that volunteers run our operation. They plan, teach and evaluate our courses, and the same could be said for other crucial elements of our social and educational program as well. They are not employees, and yet they also are not in charge—they do not direct the organization.

Why is this the case? They are situated in a 501c3 educational institution with its own organizational chart of employees, and its own volunteer leadership (commonly known as a board of trustees) and typically they have a professional director, charged with fiscal, staffing and facility responsibility.

How an institute walks this bridge shapes its future and its fortune.

I won't try to tell you the bridge hasn't shaken at times, and I won't contend that this director hasn't on occasion gotten vertigo. The directors' walk can be a tight rope act because we don't have the luxury of telling our member-leaders

that they ought to focus on strategy and leave operations to employees. That's the advice our colleagues in non-profit leadership positions give their boards, and right they should. Not us, however. We depend on having our member-leaders working in the guts of our operations—running lunch and learn programs, training study group leaders, and publishing member newsletters. How do we address the issues of authority and control with these partners who are neither fiduciaries nor compensated members of our staffs?

Based on my experience of attempting to establish an appropriate set of practices appropriately integrating volunteer-leaders in the organization, I can offer fellow academic leaders in lifelong learning institutes the following advice.

1. Identify the Basis of Volunteer Roles

Identify the legitimate basis for volunteer roles at your institution. At Brandeis, my investigation made it crystal clear that the provost's office and university counsel had long ago promulgated an understanding that circumscribed the role that volunteers could play in any corner of the university.

This understanding had simply not been implemented in mine. The understanding I uncovered provided my basis for moving forward with explicating appropriate volunteer roles and responsibilities.

2. Charter Your Advisory Boards

Charter your advisory board, and make the board a centripetal force within your volunteer culture. Does your Provost know that your volunteers are prone to claim the prerogative to direct the organization, its financial allocations, and its staff hiring and firing? Does your Vice President of Continuing Studies know that you need assistance properly circumscribing volunteer leadership roles? The activity of chartering at your university will embed you in conversations up the food chain that will produce the shared understanding you will require in the years ahead.

3. Provide Annual Board Appointments

Legitimate roles and responsibilities not just once via a board charter, but annually by providing appointments for your board members. Symbolism is important in building a volunteer culture subject to university norms. Appoint your member-leaders with a letter signed by the vice president for continuing education or the university's provost. Include a role description, term limits, and other crucial marching orders. This letter is an emblem of belonging to an organization. It says, you play an important but inherently circumscribed role whose authority comes from elsewhere.

4. Put Member Liaisons on the Advisory Board

Establish multiple member liaisons to serve on your advisory board. A member liaison's role is to work with the director to problem solve member issues. In my experience member liaisons with a mandate to engage in problem solving quickly become an antidote to two of the most chronic difficulties in my organizational culture: leaders without enough to do, and private meetings about grievances. The first is the devil's workshop. The second the rumor mill. Member liaisons in a high-functioning collaboration with a director will always have lots of business, the business of problem solving. Over time the practice of including liaisons in problem-solving meetings with aggrieved members and the director tends to dampen the focus on the university as ostensible aggressor, and reduce community-wide suspicion by providing a ready source of peer-to-peer information.

5. Avoid Duplicating Existing Roles

Avoid any semblance of a volunteer management structure that duplicates functions already served by university management. At Brandeis' institute, for example, a problematic structure once existed in which volunteer program chairs reported to volunteer board officers. The volunteer officers had no job other than to create policy for the program chairs, people who were putting in countless hours creating the value in the organization in the form of courses and lectures. Naturally, the program chairs felt resentful of this hierarchy, and the volunteer officers

felt protective of their own power, a dynamic that pitted them also against the director and the university. Doing away with this three-headed hydra, my organization has found that program chairs now feel more influential vis-à-vis the university, and more valued by institute community.

6. Be Transparent

Don't play hide and seek regarding where power lies. Organizational policy on matters of finance, physical plant, and staff always resides with the fiduciary, in my case, the university. Better to be upfront regarding this fact of institutional life and let your member-advisors know that their power comes in the form of influence, that influence is a potent form of power, and that this power may be enhanced as trust between director and member is built over time.

Conclusion

Not all volunteers will want to work inside the structure I've begun to describe here. Fortunately, the ones that do are more likely to be the ones you actually want. Yes, an organization dependent on volunteers in the way I have described is a narrow bridge. However, I can tell you from my experience at Brandeis that working at getting it right is worth the sweat required. If you've been caught in the bind I've described here and you want to correct course, you do indeed have a tightrope act to perform. Don't look down, but also don't be afraid. There's no staying in the place you currently stand, and with balance you will reach the other side.