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# Case Study: Red Cross

Building not-for-profit leadership capacity through trust and volunteer partnerships

By Vikki G. Brock, MCC, EMBA with James McGee



**Many senior coaches** reserve space in their practice for pro bono coaching to the not-for-profit sector, while others specialize in providing coaching to this sector for reduced rates. And many coaches sit on not-for-profit boards where their coaching expertise and business experience is beneficial and valued. For the past several years I provided pro bono coaching and strategic leadership team support to the American Red Cross Central California Region and the larger Pacific Division. Read how this came about and how it has benefitted the organization and me.

My paid clients are in the for-profit sector. To set some

context, the primary difference in engagement with not-for-profits and for-profits is the passion of the people involved in not-for-profits for the organization's vision and their ability to make a difference. This is followed by the leadership skills required of not-for-profit staff to motivate, work with, and sustain a strong volunteer network. Volunteers are the life-blood of not-for-profits like the American Red Cross.

This article will address how I got involved with the American Red Cross, the development of this relationship over the past two-plus years, the strengths-based approach used, and the impact of coaching in the Red Cross Central

## Strengths-Based Dialogue

What does it mean to be a strengths-based organization?  
 What do we do with this knowledge with our regional teams?  
 What do we do with this knowledge within our Division?  
 How should this impact the work we do together?

Coast region and West Coast division. Learning points for the reader include:

- 1) How existing relationships can lead to social responsibility opportunities;
- 2) Pro-bono and/or not-for-profit coaching's value in your business;
- 3) Joy and fulfillment of making a difference in your own community.

In addition to my own recollections and observations, I include those of Jim McGee, the CEO of the Central California Red Cross region, providing the client perspective.

### 1) How existing relationships can lead to social responsibility opportunities

In September 2014 I received an email from Mike Meko, an existing executive client who was on the board of directors for one of the local Red Cross chapters within the Central California region. This email in part stated: "There are currently 22 board members in Ventura but it's a list of movers and shakers in the community and I thought you would fit in well. They are looking for people who are well connected but also individuals that can add to the group."

Now, I have been on the boards of several not-for-profits over my 30-plus years in business. The experiences were rewarding; however, at this career stage my interests were in providing coaching and consulting, without the scheduled commitment to being on a board. Nevertheless, I indicated I would consider the opportunity and the next email introduced me to James McGee, the CEO of the Central California Red Cross region.

In his email to Jim, Mike stated, "I have worked with Vikki Brock over the past four years or so. I thought she may be a good candidate for the Ventura board and the American Red Cross, especially given the changes we are going through and her expertise."

The changes referred to a series of major organizational changes, most recently a restructuring to include seven additional counties in central California.

Jim and I met at a coffee shop on Main Street in Ventura. I was impressed by his leadership presence, commitment to

community and to the Red Cross. Jim openly shared details about himself, the Red Cross, the challenges he was facing, and his desire that I join the board.

In this conversation I realized that my concept of the Red Cross supporting blood donations and disasters only was entirely incorrect. Jim shared the broader Red Cross mission and the programs and services delivered daily across his entire region, including some incredible work with local military, their families, and veterans.

Again, my desire was not to be on a board; it was to make a difference through coaching and consulting. On November 3, 2014, we agreed that my best-fit role would be to provide coaching and consulting to Jim and his regional leadership team. A win-win. I would realize later in our partnership that our work together would be a foreshadowing of things to come.

*Jim McGee: "I quickly realized in my first meeting with Vikki that there were stronger fits elsewhere. The two of us were willing to get there quickly because of our willingness to be up front about interests, strengths, our needs, and availability. In earlier stages of my career, we would be referring to this as 'partnership exploration' or perhaps even 'consultative selling.'"*

### 2) Pro bono and/or not-for-profit coaching's value in your business

Jim was the ideal client. He struck me as a business executive looking to bring his passion for leadership and corporate experience to Red Cross and was committed to building a high-performing organization. This was energizing for me.

For our first formal coaching session he came with clear goals, specific actions to take/not take, and what to do when he gets into trouble. His two primary goals were to:

- strengthen his role as coach with his direct reports, and
- invest and become really good at leading productive senior team meetings.

Jim had already begun implementing a strengths-based culture using the Gallup Strengths Finder and the Strengths-Based Leadership book.

*Jim McGee: "As we began discussing a 'leadership volunteer' role with our local Red Cross, two things came together beautifully. The first was a connection between Vikki and me. We both saw the need for a connection (as coaches do) and I knew I needed someone that I could trust given the help I needed and the work ahead of our organization in the midst of several restructurings and mergers. Second, I had to*

*commit to investing the time necessary to help Vikki help us. Not only clients being responsible for the hired consultants success, as a volunteer manager, I needed to make the investment into Vikki to not only help us, but to set her up for a great experience with Red Cross.”*

On July 14-15, 2015, Jim held an all-team meeting in Ojai, California with the goal of developing trust within his leadership team. This was the first time the entire restructured region had gotten together. A few months earlier a working team developed a set of guiding principles that were unveiled at this meeting and set the foundation for Red Cross culture and behavior. Jim and I strategized on the meeting agenda before and lessons learned after the meeting.

**Jim McGee:** *“Vikki’s investment in the team and speaking with each of my direct reports prior to the meeting helped her build relationships early with team members. These conversations also set the tone for the discussion when we were together. Our team made significant progress over the course of these two days and proved to be a critical turning point for our region. What I realized down the road was that in working with Vikki, I was also modeling the type of relationship we want to have with leadership volunteers.”*

During one of our conversations about building a strengths-based culture, Jim asked if I would be willing to support the Western Division Red Cross Regional CEO meeting scheduled for late May, 2015. Of course I said yes.

With the goal to create stronger and more impactful leaders, we used the Gallup’s Strengths Based Leadership (SBL) book and assessment to engage in a meaningful dialogue around leadership strengths. Each Regional CEO took the assessment and participated in a 1-on-1 confidential debrief via phone with me. I was also privileged to work with Kathleen Sack, Director of Talent, Organization, and Development from Red Cross headquarters in Washington, DC in designing the facilitation at the May meeting (see “Strengths-Based Dialogue sidebar). As I was traveling in Kenya during the meeting, Kathleen facilitated the strengths discussion in what was a great meeting.

**Jim McGee:** *“It was encouraging to not only have Vikki active with my peer group but also to be having such a focus on people – our strengths and how our strengths play out as leaders. In most organizations, the laser focus on achieving results, managing our financial position, revenue generation, program and service delivery is at the expense of*

*leading and investing in our people.*

*“For some of my colleagues, working with Vikki directly not only brought new insight, but also recognition that they have an opportunity to recruit and use volunteers similarly back in their respective regions. As a trusted volunteer, Vikki continues to keep me focused and challenged on my team as the local Red Cross leader.”*

In early June 2015, Jim came for our coaching session on my 50-foot boat where I live and work, and this is where we have been meeting ever since. Our work together has been very fulfilling, including coaching typical CEO personnel challenges and difficult conversations, building a strengths-based culture, and developing the leadership team.

In addition, confidential coaching has been provided to several regional leaders. On the consulting side there has been agenda collaboration and facilitation for off-sites, creating strengths team matrix grids and training Red Cross staff to debrief Strengths Finder assessments, and participating in strategic initiatives at the regional and divisional levels.

In the past 18 months, Jim has continued to develop trust and capability within his leadership and all staff teams. My work with Jim continues to focus on strengthening relationships across his leadership team with the goals of knowing each other better and leveraging collective strengths; providing clarity around priorities, strategies, and goals; and to deepen trust and commitment to the work ahead.

It has also been encouraging to see Jim’s role shift more to a coaching role over the past 18 months. In Jim’s words to me, “The work you did around trust, starting up at the Ojai retreat, was a difference maker for our team at that time post-merger. The investment you made in each team member was and continues to be significant. You are a trusted partner and member of our team.”

Fast-forward to August 4, 2016 in Oxnard, California

## Talent Discussion & Succession Planning Conversation

1. Current role / duration in role
2. Major accomplishments
3. Any shortcomings / misses
4. Strengths (Gallup)
5. Weakness / Development Areas
6. Performance Recommendation (see attachment)
7. Next Role / Steps (see 9 box matrix)

when the leadership team met for its annual Talent Discussion and Succession Planning conversation (see sidebar on previous page). Working with Jim, Kelley Reszetylo, regional volunteer officer, Dylan Houck, intern volunteer, and several others, we met to develop a volunteer strategy conversation for the meeting. In her first major facilitation activity, Kelley stepped up to facilitate the volunteer conversation – leadership development in action.

*Jim McGee: “Having three leadership volunteers participate in such important roles in the meeting – Vikki; John Supino facilitating our Strategy framework and work; and Susan Wolf facilitating our work around talent calibration and development (to be rolled out later with volunteer leadership) – speaks to the significant progress we’ve made engaging talented, professional volunteers in our work.*

*“You might ask, why focus on volunteer leadership? Well, in the Red Cross (and most not-for-profits), the ratio of volunteer staff to paid staff is 50:1. Remarkably, on average 95 percent of Red Cross programs and services are delivered by volunteers. As you know, motivating and engaging paid staff is challenging; imagine the leadership skills required*

*to motivate, engage, recognize and retain volunteers in life-saving work that takes place 24/7 in every community across the country.*

*“Our meetings in Oxnard and Cambria were significant steps forward from our initial Ojai retreat. Our ongoing commitment to building trust based relationships within our team, our guiding behaviors, and establishing greater clarity around goals, priorities, and results, our team could shift to the most critical strategy of the Red Cross – engaging passionate and talented volunteers. The partnership Vikki and I have been able to establish is one that we desire to replicate dozens of times over across our ten county local Red Cross region.*

*“This was the focus of our time in Oxnard and Cambria - how do we begin to hold ourselves accountable while re-sourcing our teams to achieve this vision. Having leadership volunteers like Vikki in the room with us during this journey is an example of the mutual work it takes as well as the ‘huge win / win’ for everyone when it works.*

*“Yes, as volunteers we want to have an impact and make a difference, be part of a community, and be recognized in our own individualized way. Most important, I believe, are the relationships we have with the people we are making that*



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*difference with. My team trusts Vikki, has benefited from her expertise and coaching, and loves working with her."*

### 3) Joy and fulfillment of making a difference in your own community.

As a coach and consultant for over 20 years, very little of my business activity has been in my own community. My relationship with the Red Cross has allowed me to do the work I love with talented professionals, while making a difference through others. Meeting other Red Cross volunteer leaders is an added bonus. In hindsight, I would have agreed to be an official volunteer when first asked in February 2015.

So, how do you find the ideal volunteer opportunity? Think through the questions in the sidebar below, beginning with the causes or issues that matter most to you. The key with volunteering is your intent. For me it was to give back in the best way I know how, through coaching and consulting. And I have gotten so much more than I have given – it's truly a win-win for all. ●

**References:**

Ellis, Susan J. *Finding the Right Volunteer Opportunity for You*. Retrieved December 12, 2016 from <https://www.serviceleader.org/volunteers/finding>

## Finding the Right Volunteer Opportunity For You

- What causes or issues matter the most to me?
- Do I want to volunteer for something that uses the skills I apply in my paying work or do I want to do something completely different?
- What would I most like to learn by volunteering?
- What don't I want to do as a volunteer?
- Do I want an ongoing, regularly-scheduled assignment, or a short-term assignment, or a one-time assignment?
- Do I want to work alone or with a group? Or with a friend or my family?
- Am I willing to participate in a training course or do I want to start my volunteer work immediately?
- With what kind of people do I want to work--both in terms of who is receiving services and who my co-workers might be?
- What should I expect when I contact an agency to apply to become a volunteer?
- How do I find information about volunteer opportunities?

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