



RPRO
ACADEMY

AEI: When Leaders Become Liabilities

Course Summary

- **Title:** When Leaders Become Liabilities
 - **Length:** 45 minutes
 - **Day and Time:** Thursday, March 14, 10:45am – 11:30am
- **Delivery Method:** In-Person

Course Description

To err is human... but sometimes error becomes a major liability for associations, and the leaders who err can be held accountable. This session will highlight the difference between error and major organization liabilities, and how to take the necessary steps to protect the association and members during times of major upheaval. Explore what volunteer leader traits may be a tangible threat to the association. Then learn the appropriate steps to navigate and communicate through the storm, including how to press reset after a dramatic change has occurred.

Learning Objectives

At the conclusion of this course, students will be able to:

- Distinguish qualities in volunteer leaders that create difficulty for the association and real liability risk for the association.
- Identify key areas of association management and governance that impact a liability scenario with a volunteer leader.
- Create an action plan for improving governance areas and training relating to liability scenarios with volunteer leaders.

Timed Course Outline

5m	Introduction
5m	What qualities make a less than ideal leader? <ul style="list-style-type: none">- Honesty & Integrity- Lack of Preparation- Drama Triangle → Victim, Blamer, Rescuer- Lack of Knowledge- What qualities are a difficulty, but not huge risk of liability?
5m	What qualities make a real risk for the association? <ul style="list-style-type: none">- Harassment- Discrimination- Hostile Work Environment- Breaking Confidentiality- Financial Mismangement- What qualities are more than a difficulty and post a real risk? (Getting sued & losing)
5m	Bylaws <p>Scenario: You have to remove a key officer.</p> <ul style="list-style-type: none">- What do your bylaws say about removal?- What do they say about a vacancy?- What do they say about the Immediate Past President?
5m	Policies <p>Scenario: You have a leader who has trouble with confidentiality.</p> <ul style="list-style-type: none">- Do you have a confidentiality policy? What are the consequences?- Harassment & discrimination policy?- Whistleblower policy?

5m	<p>Procedures</p> <p>Scenario: Someone complains about harassment at an event.</p> <ul style="list-style-type: none"> - What is your procedure for a complaint? - What is your procedure for investigation? <p>Scenario: You have to remove a key officer.</p> <ul style="list-style-type: none"> - What is your communication procedure for your Board of Directors? - How do you keep necessary parties informed but protect confidentiality?
5m	<p>Team of Experts & Insurance</p> <p>Scenario: You are facing a serious issue that might warrant removal.</p> <ul style="list-style-type: none"> - Who is your legal counsel? Are they competent in that area? - Do you have a parliamentarian to navigate the procedural aspects? - Do you have a communications or PR person with a strategy? - What is your insurance policy and coverage?
5m	<p>Rebuilding</p> <ul style="list-style-type: none"> - Procedural rebuilding phase (bylaws, policies, etc. on vacancy and replacement) - People rebuilding phase (the leaders that step up and step in) - There will often be criticism and other backlash, but preparation and planning can minimize it.
5m	<p>Stop, Drop, & Roll → Do a fire drill. Plan. Prepare.</p> <ul style="list-style-type: none"> - Don't be taken by surprise. Have a plan ready to go. - Practice the plan and train on these issues every year. - Stop, Drop, and Roll → You have likely never been on fire before. But, if you ever are, you will be glad you learned this as a child. - Don't ignore issues. These things are hard, but doing the right thing is always the right thing.