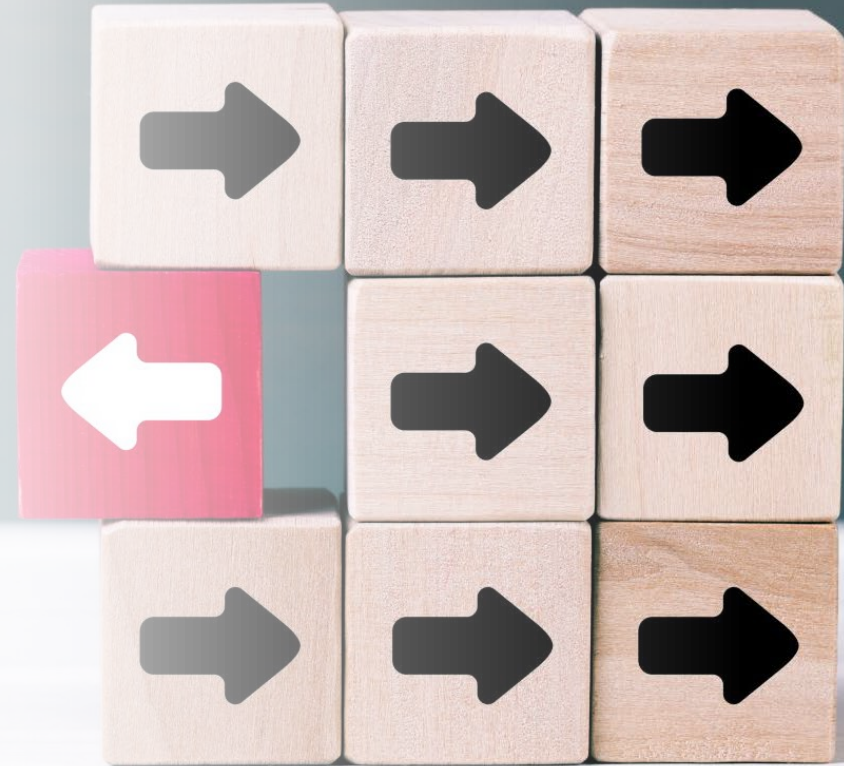


When Leaders Become Liabilities



**Have you
ever had a
volunteer
leader that
was...**

Concerning...





Learn Not To Burn



The Association Fire Drill



Bylaws



Policies



Procedures



Team of Experts



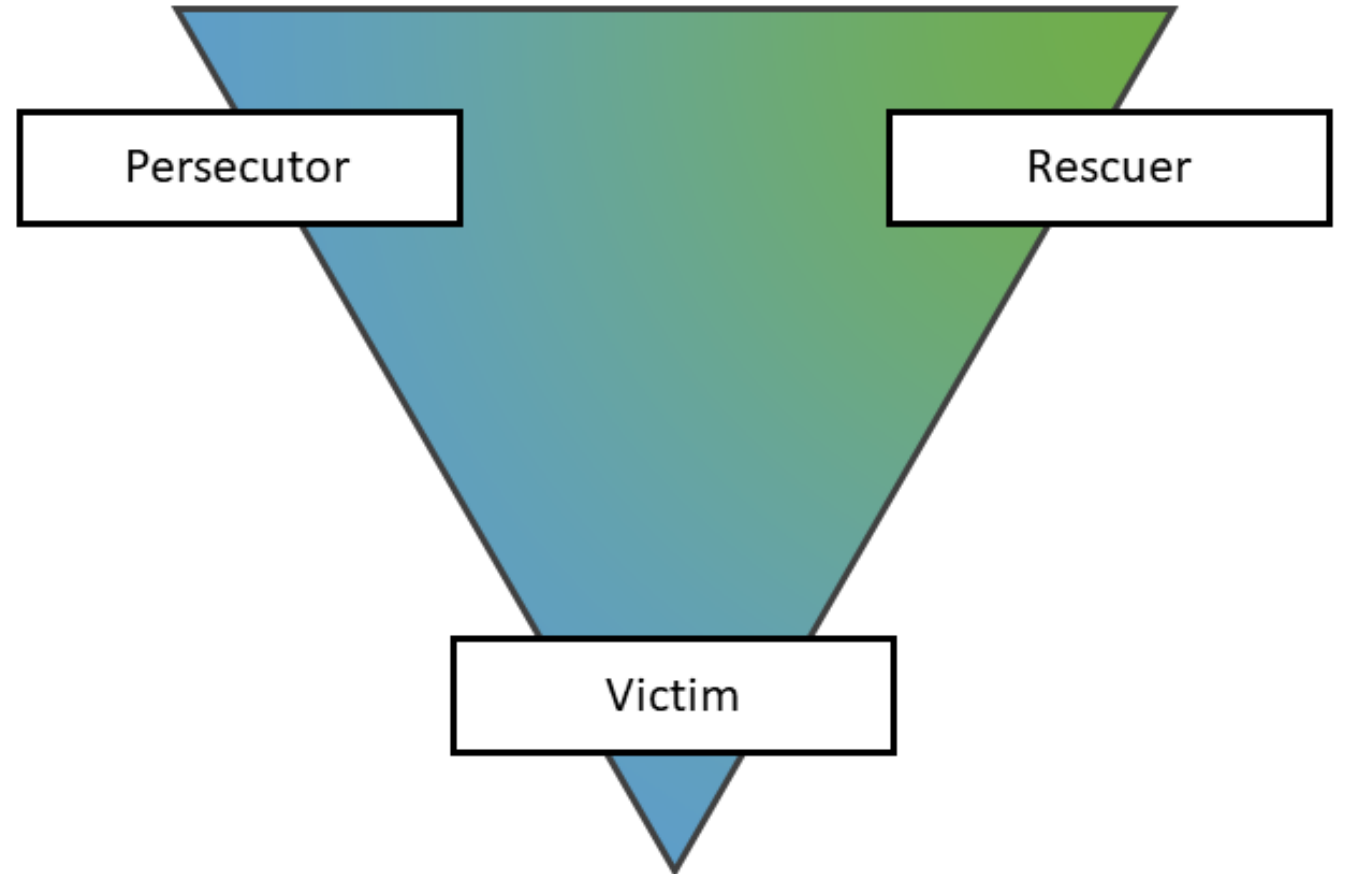
Insurance

What qualities make a less than ideal leader?

They are difficult, but not a significant risk of liability.

Less Than Ideal

- Lack of Preparation
- Lack of Knowledge
- Over Involved
- Knows Everything
- The Drama Triangle



Significant Risk to the Association

- Harassment
- Discrimination
- Hostile Work Environment
- Breaking Confidentiality
- Financial Mismanagement



The Association Fire Drill

***STOP!* Prepare**

- Review & Update

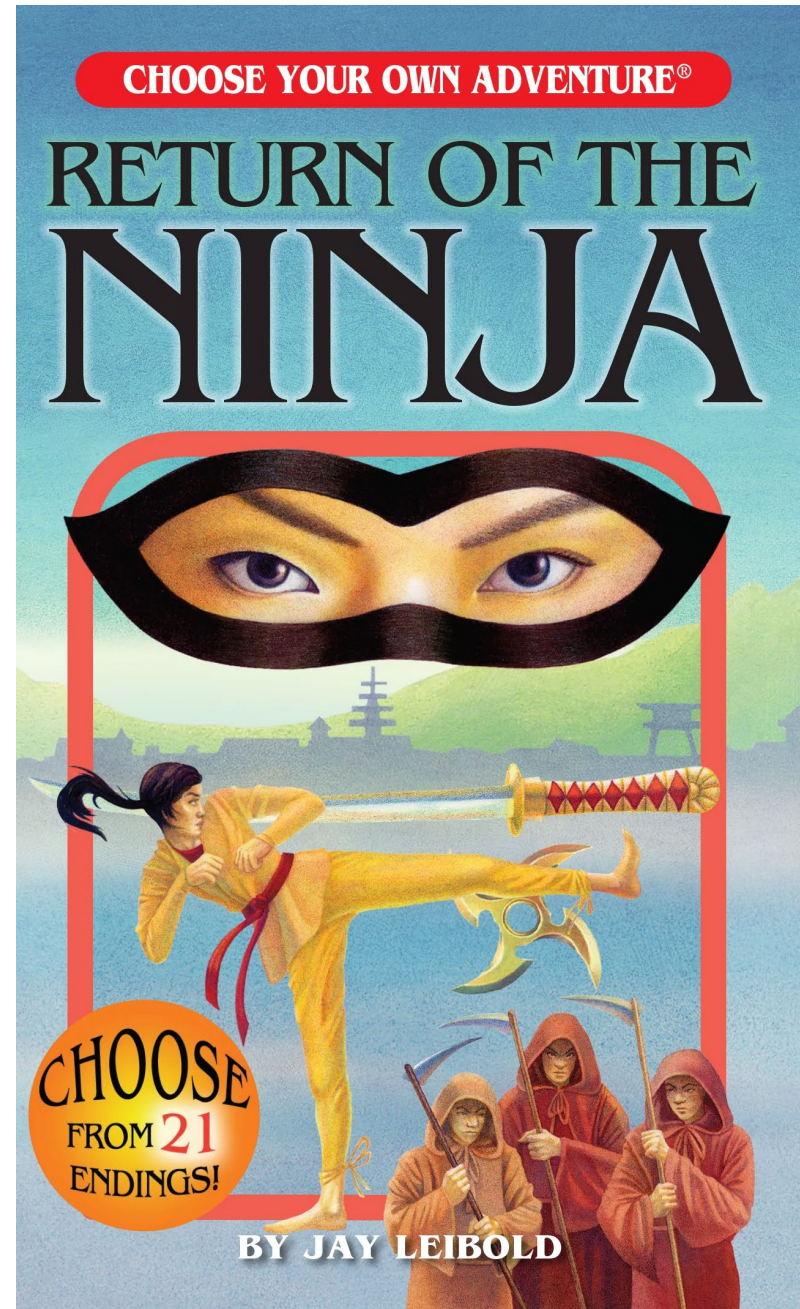
***DROP!* Practice**

- Train & Discuss

***ROLL!* Perform**

- Implement & Execute

Choose Your Association Adventure





Fire Drill Step 1

Bylaws



SCENARIO: You have to remove a key officer.



Option 1

Our bylaws clearly address removal of an officer and how we fill a vacancy.



Option 2

Our bylaws are outdated and the process for removing an officer is unclear and confusing. The process for filling a vacancy is messy and convoluted.

Option 2: Uh-oh...

YOU GOT SUED!



**Option 1: It
wasn't easy...**

Minimizing risk requires
clear bylaws.



What do your bylaws say?

Removal

Filling Vacancies

- Removal, Death, Resignation

Immediate Past President Issues

- Removal, Resignation





Fire Drill Step 2

Policies



SCENARIO: You have a leader who has trouble with confidentiality.

- **Option 1**
 - You have a confidentiality policy that all leaders sign. The policy clearly sets forth what information is confidential and consequences for violations.
- **Option 2**
 - You have a confidentiality policy in a dusty old book in a drawer somewhere.





Option 2: Ugh...

- Our friend with a confidentiality problem continues to have a confidentiality problem.
- We struggle to find any recourse.
- We start to lose our good people...



Option 1: Accountability

Our clear policy, signed by everyone, has given our other volunteer leaders the opportunity create accountability.

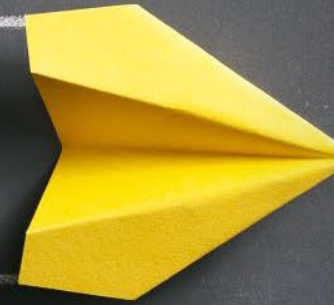
What policies do you have?

Confidentiality
Policy

Harassment &
Discrimination
Policy

Whistleblower
Policy

Fire Drill Step 3



Procedures



SCENARIO: A member complains about a leader saying they harassed them at an association event.

Option 1

- We have a procedure outlined for any complaints from staff or members. It outlines the process for submitting complaints, investigating, etc. It's handled correctly and we avoided any major issues.

Option 2

- We don't really know what to do with the information, so it sits around and doesn't get addressed hoping that it doesn't happen again.



Option 2: It happens again... and again...

- Over time the harassment continues.
- Now we have 5 members coming forward with complaints.
- It gets very public, and very ugly.



Option 1: We followed the process.



The issues was documented appropriately under our procedure.



It was promptly investigated.



Appropriate action was taken, and we have no further issues.

Do you know the procedures?



What procedures do you follow for a complaint?



What procedures are followed for an investigation?



What is your communication procedure?

Ex. Board of Directors on removal proceedings?



How do you keep only necessary parties informed and protect confidentiality?



Fire Drill Step 4 & 5

- Team of Experts
- Insurance



SCENARIO: You are facing a serious issue that might warrant removal of an officer.

Option 1

- We have a team of experts at the ready we can rely on to help us with legal issues, procedural issues, and communication issues. We are adequately covered through an insurance policy that offsets our costs.

Option 2

- Our insurance is lacking, and we try to figure out the process as we go.



Option 2: We blew it...

- Our insurance wasn't sufficient, so now are having to pay legal fees out of reserves.
- We didn't follow the right procedures, so now we are getting sued.
- It doesn't look good...

Option 1: The A-Team Appears!



We have a good relationship with legal experts, parliamentary experts, and communication experts.



Everyone jumps to action to ensure we follow the right procedures, protect our interests, and communicate correctly.

**Teamwork
makes the
dream work!**

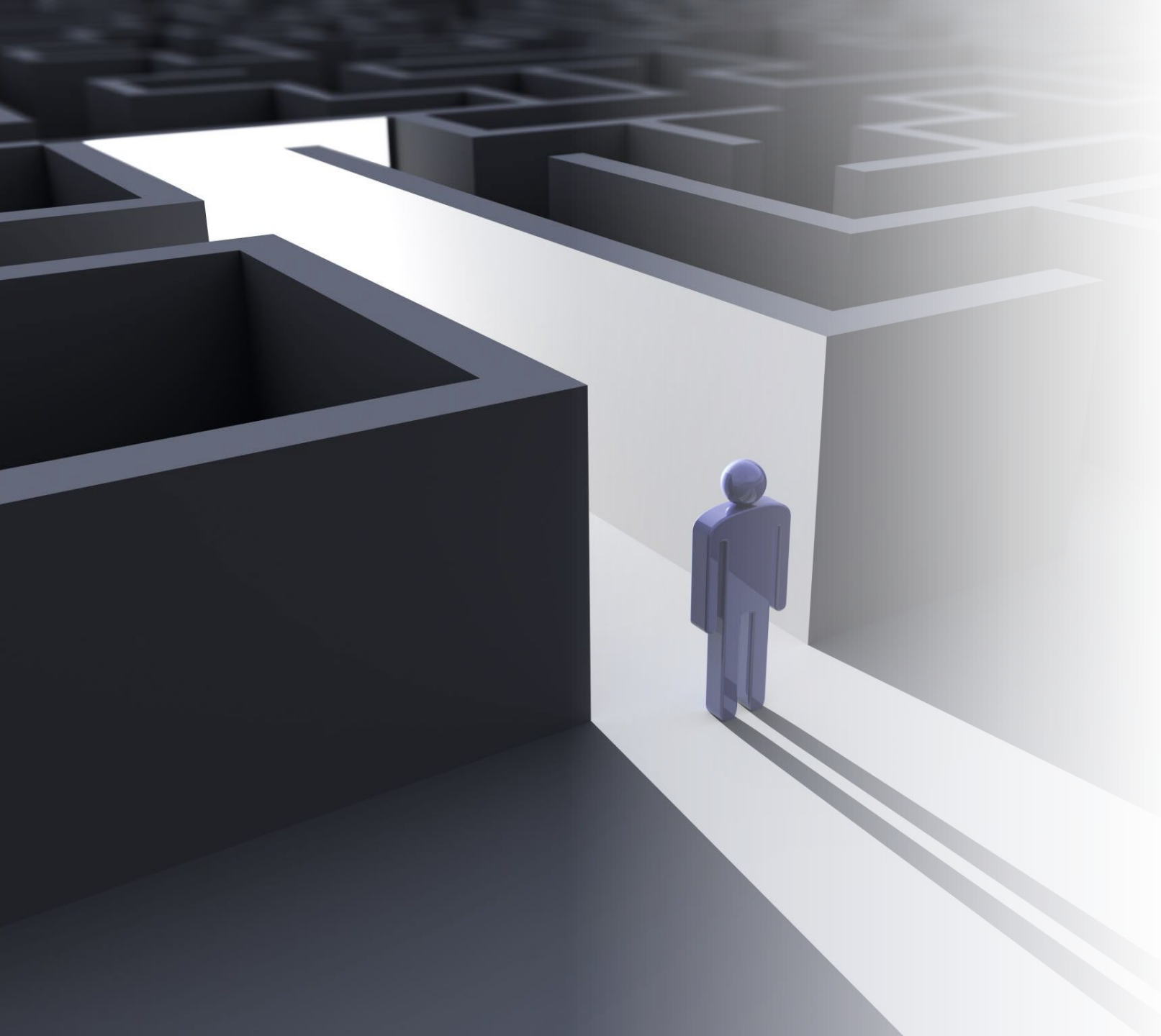
Competent Legal
Counsel

Parliamentary
Procedure

Communications and
PR

Are you properly
insured?

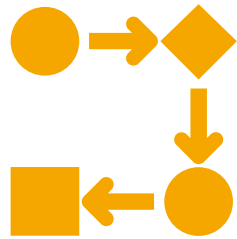




**It wasn't
easy, but it
was the right
thing.**

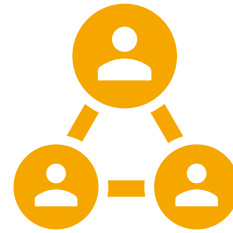
Now we rebuild.

Rebuilding



Procedural Rebuilding

What did we learn? What do we need to fix or update?



People Rebuilding

Who are our great leaders?
Who will step up and step in?

What to expect.



There will be criticism.



There will be backlash.



There will be opinions.



There will be imperfect actions.



There will be learning.



There will be growing.



Your Action Plan

Learn not to burn!

Do a fire drill.





Your Action Plan

The Association Fire Drill

- Don't be taken by surprise. Have a plan.
- Practice the plan & train on the plan annually.
- Review & update everything regularly.
- Don't ignore issues. Take action.



Stop, Drop, & Roll

You will likely never find yourself on fire.

But if you do, you will be glad you are prepared.



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