



## **Case Study: Assessing and Revising HOPA's Volunteer Management Process**

April 26, 2022

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For the 2022-2023 term, which begins on June 1, 2022, HOPA will have 39 committees, subcommittees, councils, work groups, and task forces. Each of these volunteer groups play an integral part in the mission of supporting hematology/oncology pharmacists and optimizing care for those with cancer.

Recently, HOPA staff identified some areas for improvement when it comes to turning over committees each year. The goal of these changes are to improve productivity, communication, workflow, and member engagement.

### **The Problem**

The 2021-2022 committee year opened with 315 volunteers (or roughly 8.5% of members) serving across nearly 40 committees, subcommittees, work groups, and task forces. Additional volunteer opportunities were created by the formation of new task forces throughout the year. Still, a substantial number of members who were willing to serve were left without volunteer positions.

Committee terms were also too flexible, allowing some committee members to renew their two-year terms multiple times which limited the number of open volunteer positions. This was counterproductive to the goal of creating greater engagement from a broader range of member volunteers.

### **More Interest than Openings**

During the volunteer application process, which typically occurs during the month of April, members were asked to apply for up to two committees and then specify their primary and secondary choices. While most applicants followed the guidelines, some did not specify their preferences at all, while others found creative ways to try and improve their chances of being selected.

Whether applying more than once, or writing a lengthy explanation for why they wished to be selected, it was clear many members sought a competitive advantage. In some cases, committee leaders identified members with the right qualifications but who had not applied for their respective committee.

During the volunteer selection process, Chairs and Vice Chairs often learned that their lists of recommended committee members were vastly different from the final approved list due to the de-duplication process. As a result, much of the work they put in to selecting their top choices for committee members was negated.

### **The Need for a Leadership Path**

In addition, the process lacked a leadership pipeline and there was no inherent succession plan. As a result, the HOPA President and President-Elect were tasked each year with selecting a new slate of committee Chairs and Vice Chairs, often without a lot of knowledge of an individual's contributions within the committee.

It became apparent that the role of the Board liaison is integral in the selection process given their working knowledge of each committee. It became further apparent that identifying and cultivating future leaders earlier in the process would be helpful not only for the organization, but also for the member's own professional development.

### **Delayed Start to Committee Kick-Off and Other Inconsistencies**

Once selections were made, a number of Board members were unfamiliar with the committee members being presented for approval. Due to the extended time it took to select and then obtain Board approval of the final committee members, volunteers were not notified of the final determination until well after the committee year started.

The former committee composition could possibly include Chairs, Co-Chairs, Vice Chairs, Co-Vice Chairs, Past Chairs, Members, At-Large Members, Student Members, Resident Members, or any variety of these positions, leaving inconsistencies across the organization.

Also, having a significant number of committee members turnover annually caused many delays in getting the committee work off the ground given the administrative work and orientation processes needed shortly after the committee year began. It can take a few months to get a new committee up to speed and scheduled for regular calls and meetings.

### **The Solution**

After gathering feedback and researching processes with other associations, HOPA adopted new policies and procedures that aim to address some of these concerns.

First, the Vice Chair will ascend to Chair after a one-year term. Vice Chairs will be selected from the current committee membership whenever possible as they are individuals who are already dedicated, knowledgeable, and well-suited for a leadership role.

A succession-planning questionnaire was created to help inform the Board about potential candidates for Vice Chairs for the leadership pipeline and succession planning. Their information is valuable as it will come directly from someone who will have had a wealth of experience from within their respective committee.

Second, after serving as Vice Chair and then Chair for one term, the Chair will ascend to a role as Past Chair for one year (for standing committees only). The Board will only approve the Vice Chairs annually, given the important role those individuals will play over their three-year commitments as Chair, Vice Chair and Past Chair.

The new plan allows for committee leadership to serve in these three different key roles and will assist with leadership development, potentially creating a pipeline to Board leadership. Furthermore, it will allow for continuity as the committees turn over annually and leave more autonomy to the Chairs and Vice Chairs in determining committee composition. This seemed reasonable given their more intense vetting process (reviewing CV's, overall committee composition, working with their Board and Staff liaisons, etc.)

Standardization of committee roles was also implemented as appropriate to help streamline committee management processes and determine roles and responsibilities for each. Another element of this new process is that staggered, non-renewable terms were implemented so that only a few members are new to the groups annually.

The goal with the change to the committee terms is to allow for better continuity of work year over year. With non-renewable terms, the intention is to make space for a more diverse number of individuals who are interested in committee service but have not been able to do so because, historically, there have been more interested volunteers than there have been positions.

### **Implementation**

In November 2021, the HOPA Board reviewed and approved the changes, in concept, and the policy manual was updated to reflect the changes. After determining that no committees would be sunset in 2022, current Chairs of standing committees were invited to serve a one-year term as Past Chair on their respective committees from June 2022-May 2023.

Vice Chairs were approved and invited to serve a one-year term as Chair (then ascend to Past Chair for certain committees) from June 2022-2023.

In February 2022, staff, and Board liaisons, along with Chairs and Vice Chairs, provided recommendations for changes to committee charges as well as their recommendations for individuals to be invited to serve in the role of Vice Chair. The Vice Chairs have been approved and invited, while the charges are pending finalization and review. Upon approval, they will be presented to the new committees at the start of the next term.

### **Enhancements to the Volunteer Activity Center**

The VAC opened on March 25, 2022 and will be closing on April 29, 2022. New this year in the VAC will be the opportunity to sign up for the General Volunteer Interest Pool.

If members are interested in serving as a volunteer with HOPA, but are open and flexible about which group they might like to join, they can apply to be a part of this general volunteer pool. When there are additional spots available on committees, our leaders will check this pool of candidates for potential members. Selected members will receive an invitation to the specific group along with information about the group and responsibilities. HOPA will return to this pool throughout the year as other positions become available.

All decline and invite letters will be sent to committee members in May. The VAC will remain open to post any vacancies that still need to be filled, as well as remain open for the general interest pool. Members who are not selected to serve on a committee are encouraged to apply for these open positions, check back throughout the year for other opportunities, or join the general interest pool.

Committee member selections will be finalized in June 2022 and an orientation will be held with committee Chairs, Vice Chairs, and staff liaisons. This year, all committee members will receive a handbook prior to kick-off meetings that will take place throughout the month of June as schedules allow.

On behalf of the entire HOPA staff, we would like to extend a special thank you to all our volunteers - past, present, and future! We would also like to thank the Board of Directors and committee leadership for embracing this new process.