Key characteristics of

Healthy Organizations

Episode 3: Roles & Recruitment

river NETWORK

ABOUT RIVER NETWORK

River Network grows and strengthens a transformational national network of water, justice, and river advocates.

We envision a powerful and inclusive movement that ensures abundant clean water for all people and nature to thrive. We believe that joy and hope for our planet flows through our rivers.

Meet the network and search our Water Protectors Map on our website!
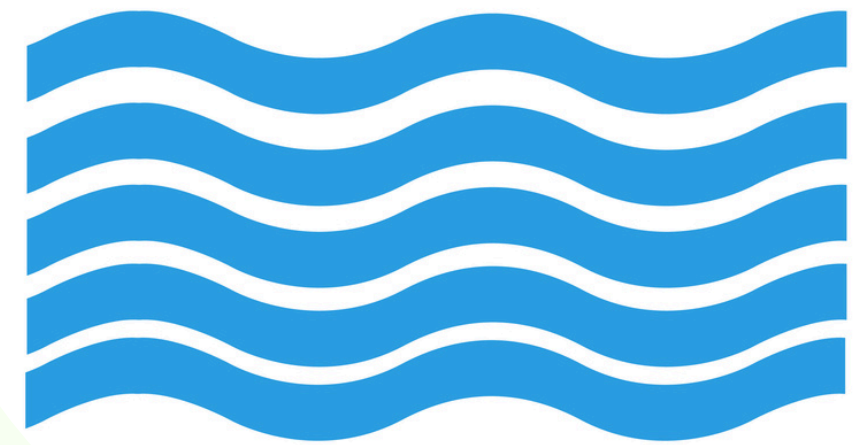
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IN PARTNERSHIP

This work is produced by River Network with collaborative support from the Hudson River Watershed Alliance.

The production of these resources has been funded in part by a grant from the New York State Environmental Protection Fund through the Hudson River Estuary Program of the New York State Department of Environmental Conservation.

DEFINED ROLES

Defining roles for those involved in your group or organization serves a number of purposes: avoiding confusion and duplication of efforts, giving individuals the ability to self-manage confidently, guiding work and directing outcomes, and giving folks a sense of purpose. It's a best practice to define roles in writing with a position or role description, similar to a job description.

- *What roles exist in your group/organization?*
- *Which roles need clarity and a written description?*
- *Are any roles/positions out-of-date, and need revision?*
- *Where do you keep/will you keep position descriptions, so members can access them?*

Plan

Budget

Position Descriptions

Leadership

Mission Statement

DEFINING ROLES

1. Clarify who does what
2. Give direction to individuals in new roles / new to the organization
3. Set healthy expectations / prevent burn out
4. Provide helpful structures and boundaries
5. **Aids in recruiting new people**
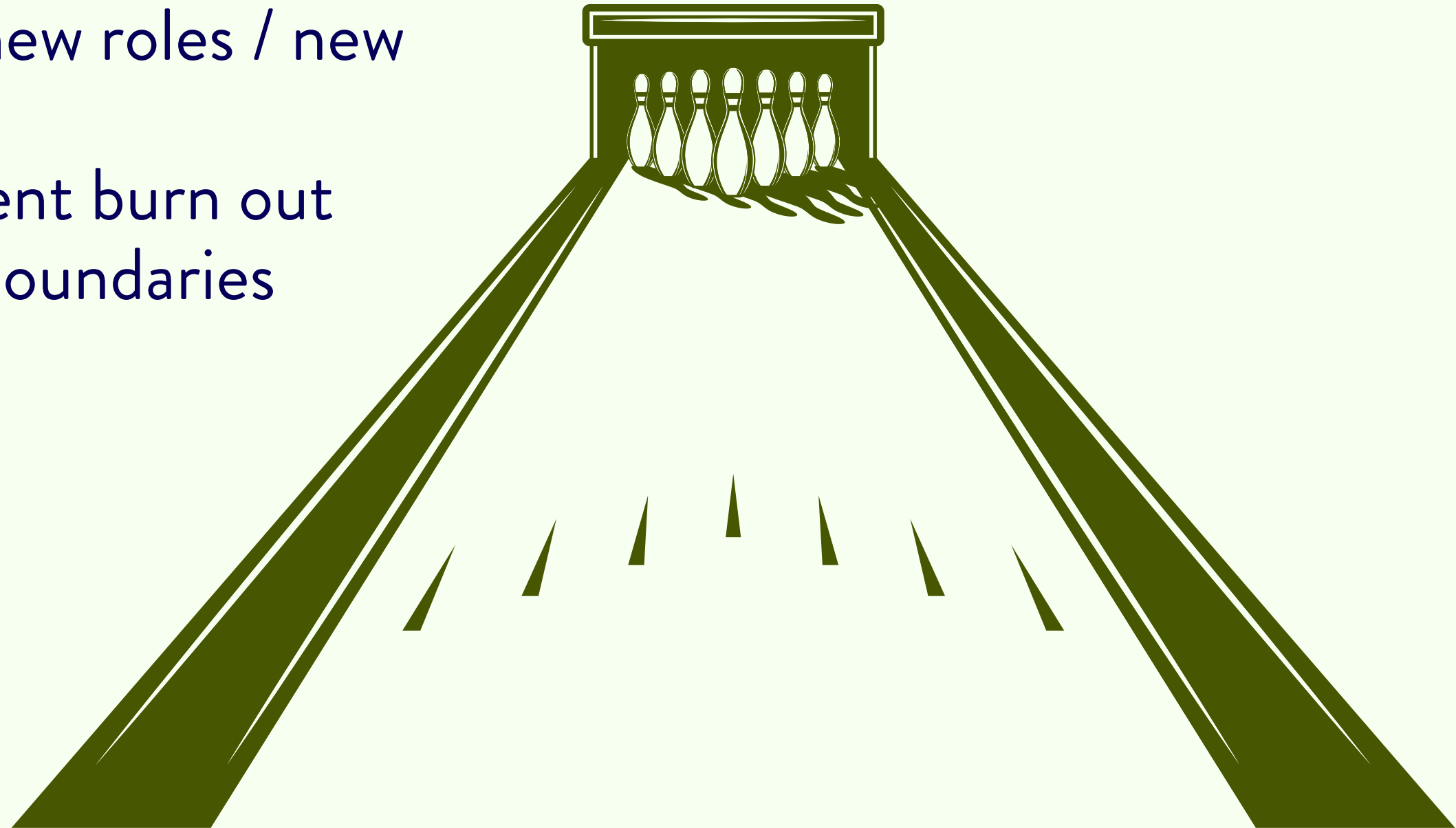
WHO NEEDS IT?

- Board of Directors:
  - President/Chair
  - VP/Co-Chair
  - Secretary
  - Treasurer
  - Committee Leads
  - General Members
- Recurring volunteer positions
- Committee positions
- STAFF

POSITION DESCRIPTIONS

INCLUDE:
- Position Title
- Time Commitment (per month, per week)
- Works with/Reports to
- General Duties
- Helpful/Required Skills
- "Benefits"

RECRUITING - STEP 1

Effective recruiting starts with knowing what you NEED, which requires understanding what you already HAVE: Consider using an inventory exercise!

Current Board Members						
Time on SC (date joined)						
Position/Chair						
Committee assignment(s)						
Skills						
Accounting/Financial Mgmt						
Fundraising						
Grant Apps/Mgmt						
Facilitation/Meeting Mgmt						
Communications/Marketing						
Legal						
Education						
Biology/ Ecology/Nat. Science						
Community Engagement						
Community Development						
Economics						

INVENTORY

Skills
Accounting/Financial Mgmt
Fundraising
Grant Apps/Mgmt
Facilitation/Meeting Mgmt
Communications/Marketing
Legal
Education
Biology/ Ecology/Nat. Science
Community Engagement
Community Development
Economics
Other:
Other:

Connections
Local Business Owners
Developers
Agricultural Community
Nonprofit Partners
Tribal Communities
Foundations
Elected Officials
Other:
Other:

Demographics
Gender Identity
Age
Racial Identity
Community/Location
Other:
Other:

What else comes to mind for your organization?

FRAME: TIME, TREASURE, TALENT

TIME

Consistent & dependable

Ready to learn/flexible skills (generalists)

Engagement with organization is long-term

TREASURE

Access to funding relationships

Large individual donor

In-kind donation connections

TALENT

Specific key skills:
Accounting
Legal
Fundraising
HR
Communications
Lobbying

INVENTORY

Based on inventory results...
- Add needed skills to position descriptions
- Create a new position description if needed
- Include "preferred" criteria as needed:
  - "Candidates with connections to the small business community will be prioritized"
  - "Preference given to those with experience working with faith-based organizations"
  - "Two board positions prioritized for people of Indigenous heritage"

RECRUITING - STEP 2

Develop a screening tool - best practices:
- Interest form / application
- Available online & printable
- ALWAYS OPEN
  - Marketed when there are vacancies (even better: UPCOMING vacancies)
  - Lives on your website 24/7
- Provides specific contact for questions
- Includes anticipated timeline
- Craft questions for TIME, TREASURE, and TALENT

RECRUITING - STEP 3

Get the word out:

- Social media platforms
- Email newsletter
- Printed letter / appeal
- Direct asks to engaged people
- USE YOUR PARTNERS:
  - Neighborhood groups
  - Houses of worship
  - Program partners
- USE YOUR EVENTS
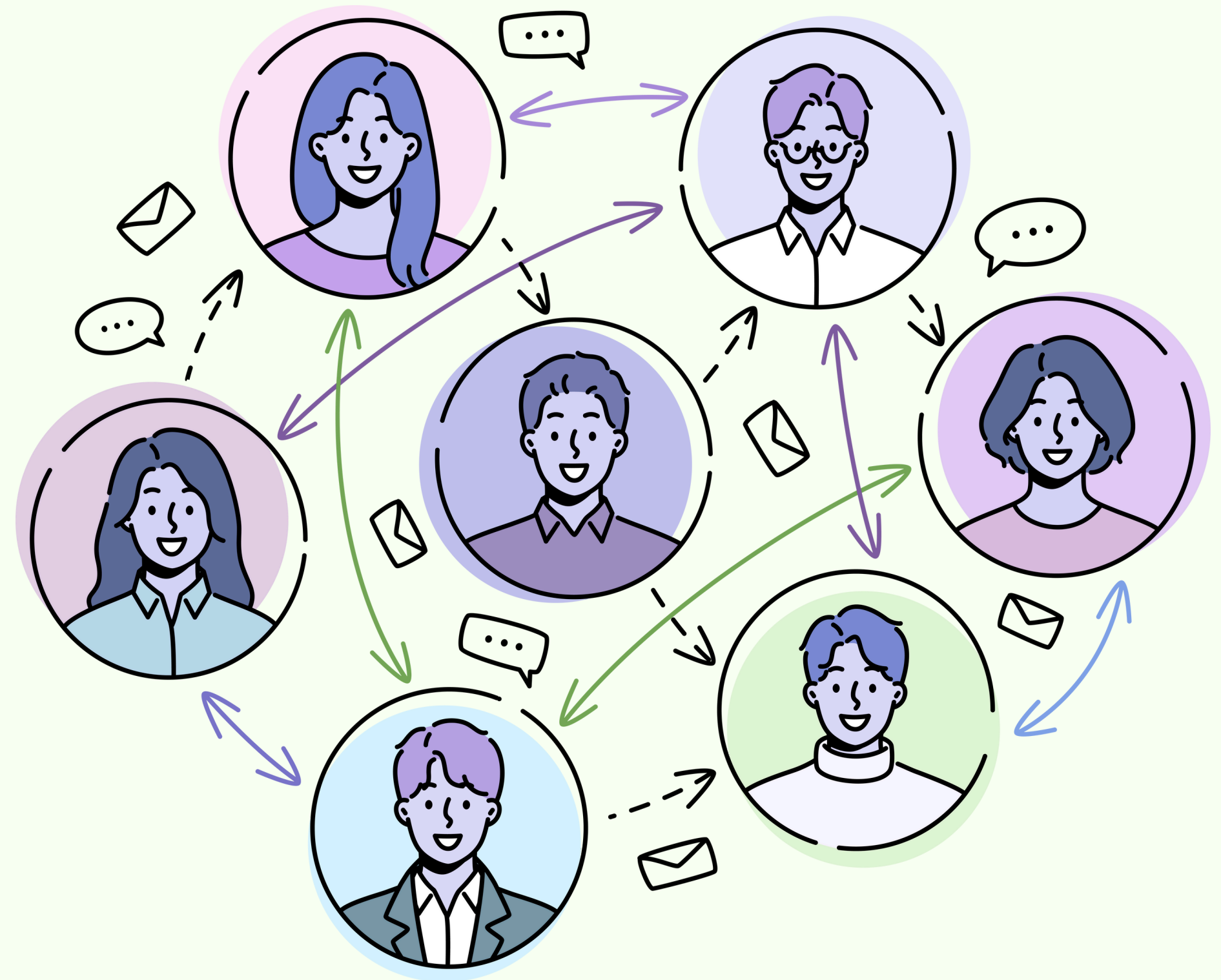
RECRUITING - STEP 4

Evaluate candidates:

- Ahead of time...
  - Decide who will be involved in evaluating interested people
  - Have a clear timeline for making decisions (communicate it outward)
- Consider...
  - Creating a scoring rubric if you anticipate a lot of interest
  - Creating a question-set or guidance sheet for reviewers

Check your inventory from Step 1!

RECRUITING - STEP 5

Make the invitation:

- Confirm interest & commitment
- Invite questions, clarifications, ideas
- Send a letter of invitation - special touch!
- Set up a meet & greet
  - One-on-one
  - Group
- Have some sort of orientation or onboarding
- Consider the buddy system

&& CHECK IN REGULARLY!

RECAP

- Why defining roles is important
- Who needs definition
- How to create a position description
- Using position descriptions to recruit new people
- 5 steps of recruitment:
  - Inventory
  - Screening Tool
  - Getting the Word Out
  - Making Decisions
  - Invitation & Welcome

ORG HEALTH CHECKLIST

For new / early stage / in-transition groups

MISSION STATEMENT

A well-written Mission Statement defines the organization's purpose, guides the work the organization engages in, and clarifies the organization's niche role in the community. A Mission Statement should be succinct: one sentence that clearly states WHY the organization exists.

- *What are the main goals of your mission statement (up to three)?*
- *Does your mission statement state why your organization is unique?*
- *When was the mission statement last revised/updated?*
- *Does the mission statement help you decide what projects and programs are right for your organization?*

Some organizations also have vision and values statements: a vision statement states WHAT the organization will do, and a values statement suggests HOW the organization will achieve it. Not all of these pieces are necessary, but in combination they can help with making clear decisions about how to invest the organization's capacity.

LEADERSHIP

Regardless of whether a group is an incorporated nonprofit organization or a collection of committed community members, it's important to have an organized leadership structure. This could be a co-leader model, a team model, or a working group model - or something unique to your group!

- *How many people currently make up your leadership team?*
- *Do you need to in-fill any expertise or skills on your leadership team?*
- *Does your leadership team model advance the work and values of the organization?*
- *Does the leadership team have a shared understanding of how decisions are made?*

For more information on leadership models, check out this article from the Johnson Center for Philanthropy at Grand Valley State University.

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FINANCE / BUDGET

Whether your group/organization is grant-funded, relying on individual donations, or accepting business sponsorships, it's important to understand your revenue and expenses. This will allow you to anticipate an accurate budget and understand what resources you need in the future. Even organizations hosting one or two events per year can benefit from a basic budget!

- *How are you tracking income and expenses (and who is responsible for this?)*
- *How are others involved in the organization made aware of spending / income?*
- *Where can you access your organizational budget?*
- *Does your budget reflect the goals laid out in your workplan/roadmap?*

WORKPLAN (ROADMAP)

A workplan (or roadmap) helps guide the work of the group/organization within a certain timeframe. Some organizations find it helpful to create a 12-month workplan, while others find it more accessible to plan for 3 or 6 months at a time. No matter the timeframe, defining actions in a workplan will help those involved in the organization feel organized, and will advance progress toward the mission.

- *Where can you access the organization's workplan?*
- *Is the workplan up-to-date?*
- *Are others in the organization referring to the workplan regularly?*
- *Does the workplan help you identify the best ways to utilize funds?*

Follow this link to access a basic workplan template - for guidance on using the template, check out this short video.
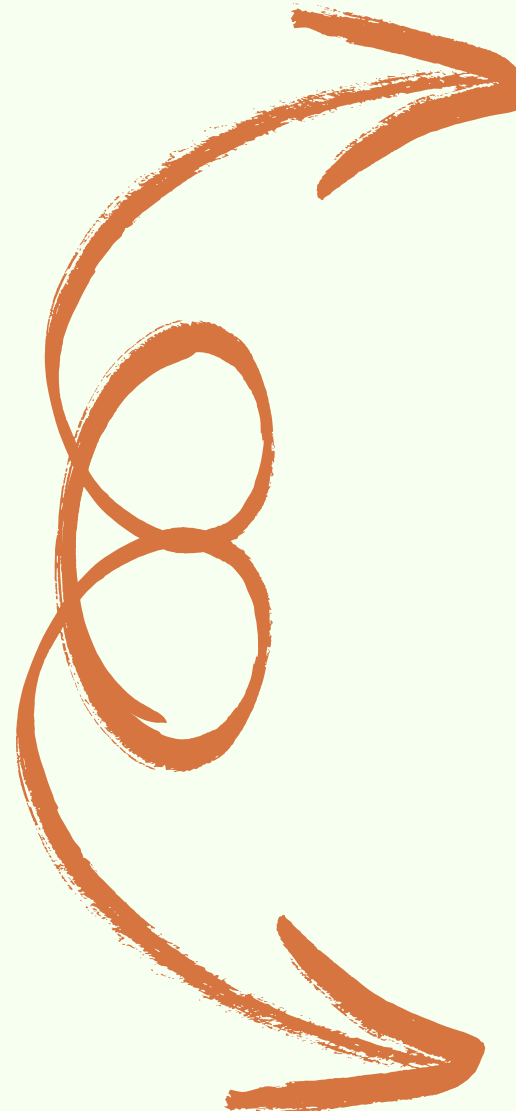
THANK YOU!

Find more information at
www.rivernetwork.org

Explore membership, resources, and join our newsletter & online community!