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By **Susan J. Ellis**

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One of the most frustrating aspects of change in organizations is that new ways of doing things seem to spring up without any consciousness of what happened in the past. This is particularly relevant to volunteerism, since agencies have high turnover in volunteer program management positions and all-volunteer associations rotate officers with every election. Too often the newcomers initiate change simply because of their own preferences or the wish to establish a new administration. They fail to ask an important question first: *Why and how did we end up where we are now?*

No one wants to be immobilized by resistance to change based on we tried that ten years ago and it didn't work. On the other hand, we are all too busy to reinvent the square wheel or duplicate the hard efforts of predecessors. The key is to do some research before we set off in a new direction. I suggest that we consider assigning someone the role of Continuity Officer. This idea would work both for a board of directors and in an agency-based volunteer program.

Boards of Directors

Everyone understands the roles of president, treasurer, secretary and the other age-old officer positions. But *Robert's Rules of Order* and other traditional references for how to run an organization have missed the boat by not recommending a Continuity Officer to assure that the organization understands its history and why earlier decisions were made. True, the Secretary generally has possession of the meeting minutes book, but how often does anyone ask for a search of historical information? Also, past minutes are often incomplete or hard to search because information is buried within long paragraphs.

A Continuity Officer would have the following position description:

- Upon taking office, will read the entire minutes history, including any written policies and procedures. [The very first Continuity Officer might agree to create an index for the minutes and policies, which would help successors enormously. In fact, given today's technology, it

might be possible to scan all the minutes into a computer so that word searches for certain topics can quickly be done.]

- When discussion occurs about a subject on which board/group action has been taken previously, will make sure the group knows what was done earlier. *The point is not to stop discussion!* But if the group wants to make a new decision, they ought to do so in the full awareness that: a) they are indeed making a change; and b) they have considered the reasoning of the previous group and feel the situation has changed sufficiently to warrant the new course of action.
- Be the "keeper" of the Policies and Procedures list (those items that do not require any bylaw changes but affect the daily working of an organization), again bringing inconsistencies or changes to the attention of the current leadership. Make note of new policies discussed and agreed to, in preparation for the next Continuity Officer.
- Monitor the passing of the baton between outgoing and incoming board members. Is there an effective Board Member Orientation process to teach how the organization operates? Are all necessary records transferred from each board member to his/her successor? Has the newcomer been informed about projects underway that will require picking up the reins of leadership?

Volunteer Programs

Volunteer program managers also ought to think about succession planning. If you were to win the lottery and leave your job, would your replacement know how the program works and *why* you set it up this way? This is an important component of a policies and procedures manual, beyond the rules themselves: record the reasoning behind certain decisions made (and date them, too). Organize your files (in cabinets and on your computer) in a logical way so that historical materials can be located easily.

If you take a job as VPM in an existing program, value continuity at least initially as a sign of respect to both your predecessor and all the volunteers who have come before. Start by talking to longtime participants and comparatively new ones, too. What do they like and dislike? Who made decisions about these things in the past? What led to these decisions? Does anyone know if there is documentation of past actions? You will learn more about this program aspect and begin to understand the reasoning behind the present situation. Three options will present themselves:

- You'll determine that, despite your initial reaction, there is indeed some validity to continuing without a change here.
- You'll be confirmed in your sense that a change is needed, but you'll be able to find a way to implement it with the participation of those who are most involved. Ideally, they should feel appreciated for their previous work and see the new methods as building on that, not superceding it.
- You'll discover that no one alive has any idea why something is being done and that you can initiate change without a problem (but based now on good reasoning!).

Usually the VPM will act as the proposed Continuity Officer, but this can also become a valued volunteer position to advise the VPM and to represent views of the various program constituencies whenever change is contemplated. Those who fight the hardest against new things, whether they be volunteers or employees, may wrongly feel that the change is a negative response to their past work. If they can be confident that someone is monitoring past decisions as well as future needs, their resistance will be less. Respect for institutional memory can actually become a form of recognition.

Events and Conferences

The concept of a Continuity Officer has application to major annual events, too. For example, an annual fundraiser or conference tends to be most influenced (rightfully so) by this year's steering committee. But some things ought not to change each year. It can drive patrons, vendors, and volunteers crazy if new procedures, forms, and other details change annually. Besides, if something is announced one year as a new annual activity, it ought to reappear the following year! Too often no one on this year's committee remembers last year's promise until it is too late. Decide what ought to be consistent from year to year and assign the Continuity Officer to watch over these.

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Submitted 1 Oct 2009 by David Prins, Triangle Country Dancers, Chapel Hill, NC USA
I have been volunteer treasurer for my organization for a couple of years now and we have run into the issue of poor institutional memory over and over. I appreciate the suggestions made by the author an others - organization and continuity are the two biggies...and two of the big challenges in volunteer orgs. (Our's is 100% voluteer run). I am very optimistic about the potential of information technology to help...but also think that a couple of details will help us apply the continuity officer concept...primarily that the officer does not need to be a part of most board meetings - they only need to know the agenda to provide perspective, and then the outcome and reasoning of decisions for their records.

Submitted on 11Dec2003by Diane Leipper, Leipper Management Group NV USA
Examples of the continuity issue I have encountered include an association that proposed a bylaws change without any awareness of why the current wording was originally adopted and a board member who continued serving long past normal tenure who became possessive of historical information and very resistant to sharing or giving up their perceived "power".

There are standard and well accepted structures already in place that address most of the issues of continuity. Every book on board management discusses a board manual which lists the documents and records that should be included.

Due Diligence is the obligation of any board member to review the appropriate association records and become familiar with their content and purpose. State statutes clearly outline the documents and procedures required for non-profit entities. These statutes also define what records need to be

kept and for how long. The crux of the issue is time and commitment. All the great record keeping in the world won't help if nobody takes the time to go through it. Use of current technology makes the management of important information much easier, more accessible, and hopefully better structured to encourage review by appropriate people.

People come and go no matter what their title or job description is. Good documentation, well maintained, and easily accessible can provide the best and most accurate source of historical information. Even a "Continuity Officer" is going to need good documentation in order to effectively serve their organization.

Submitted on 11Dec2003 by Colleen Watts, Manager, Volunteer Resources, Winnipeg, Manitoba, Canada
Here are two more ideas that I have found helpful for orientating new board members, moving the organization forward while lessening the 'reinventing of the wheel' syndrome:

1. At the end of the year, have the president, past president or secretary do a summary list of motions made by the organization during that fiscal year. If you put the meeting date at the end of each motion, future board members will be able to quickly access the background discussions from meeting minutes. Consistently doing this each year provides a concise summary of decisions made in the past. It not only prevents rehashing old issues but also quickly gets new board members up to speed.
2. Developing a one page "year at a glance" of the organization's meetings, fundraising, and regular events helps both new and old members understand the timelines and regular activities of the organization in relation to the fiscal year. You can also add behind each event which committee(s) are responsible -- this provides an overview of the committee roles in relation to the yearly activities of the organization. I have found this especially helpful for providing an overview for new volunteers being brought into an organization.

Submitted on 5Dec2003 by Tina Branco, Director Volunteer Support, Navy-Marine Corps Relief Society, Virginia, USA
Many of us have been in a position of finally being promoted or appointed or elected to a position where we feel AT LAST, I can accomplish what needs to be done. Recognizing the danger of either trampling on or ignoring what has gone before is a true sign of a professional but one which takes time to internalize. When I first took my job, I had a list of "goals for the year". My boss looked at the list and offered only one piece of advice "Try to make your goal EVOLUTION not REVOLUTION." Now ten years later, as the organization celebrates its 100th anniversary, I am just completing that first list of goals, and leading a strategic review to see what we can learn from our past to take into the next 100 years. This is a much more comfortable atmosphere for the whole organization, and honors the hard work of all who have gone before.

Submitted on 3Dec2003 by Kevin Kelley, Program Development Director, Camp Fire USA Mt. Hood Council, Portland, Oregon, USA
Yes! The idea of a Continuity Officer, in some form, is just what is needed! Sometimes it may be as

simple as taking good notes, filing them in a manner that is easy to find and use, and having an index. Policies, procedures and decisions should be documented, but we are all victims of time and heavy workload, so often information and decisions are filed in our heads. When this happens, we are often called upon to "sell" the decisions all over again to new comers, even though we have been through the process, made the decision, and have been operating quite well for a time.

While we all recognize that it is not a healthy practice to operate under the precept "we've always done it this way," nor is it a good practice to change things without reason, or just for the sake of change. We must realize why we do what we do, why we came to do it a certain way, or what outcomes we are after. After we understand the why and how, we can move on to tweaking, making changes, or doing away with things. Respect for the development of a program or process is vitally important to operating effective agencies.

Submitted on 2December2003 by Hillary Roberts, Pres., Project Linus NJ, Inc. NJ/USA
How do you assure that you remember the past while moving forward? How can volunteers help here? Isn't this where senior volunteers shine! Those of us with positive experiences utilizing volunteers with 20 years of experience under their belt or seniors who come to a volunteer opportunity with gaggles of learned experience in the private sector can attest to the benefit of introducing the past and the present to each other and being open to the enrichment both sides provide. Scholars say, "without the past, how do we guide the future." Wise words.