



Book 1

Leadership

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Chapter Leadership

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Congratulations! As an AFE chapter officer or committee chairman, you will participate in a vital function – helping guide your professional association toward its goals and objectives. Serving as a volunteer leader will be an enjoyable and educational experience. It will provide you with an opportunity to develop your leadership talents, make new friendships, and help determine the future course of your chapter and the association. Each chapter officer and committee chairman has an obligation to all other chapter members. The success or failure of your chapter depends on your ability to provide strong leadership and clear direction. It takes many years of planning and hard work to develop a strong chapter, but only one year of ineffective leadership to destroy it. Since you will probably be carrying out your AFE duties on your own time, it will be important for you to make the most effective use of that time. Knowledge of basic planning and organizing techniques will eliminate “wheel spinning” and will help you to get the most out of the hours you devote to AFE and your chapter specifically.

Your Benefit as an AFE Leader

There are many benefits – both personal and professional – that go hand in hand with the challenge of volunteer leadership in associations. For example, you will:

- Gain greater recognition and prestige
- Make valuable contacts
- Sharpen your management and communication skills
- Gain business experience you might not otherwise achieve
- Broaden your understanding of the plant engineering/facilities management field
- See, before others do, what the future holds for your profession
- Try out ideas and methods that perhaps you never get a chance to try on the job
- Take pride in adding to your resume service to a professional organization
- Develop and improve leadership skills

What is a Leader?

A leader is a manager, not an administrator. An administrator follows a certain set of procedures whether they produce results or not; a manager makes things happen.

Leaders can be described as energetic, outgoing, organized, decisive, and well-balanced. Leaders get their information primarily from working with other people. Leaders are doers. They are made, not born. They can see farther into the future than those around them.

What Motivates (Volunteer) Leaders?

It's not money! In association volunteer work, each person must be self-motivated. This is one of the reasons why association leadership is so challenging. For many, the motivation for becoming a volunteer leader is not only the benefit they receive from leadership, but also the repayment of a debt. They believe that if they are successful in their field, they should put something back into the field by working to improve it through their professional association.

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Seven Steps to Better Leadership

1. Know exactly what your duties are
 - a. Understand the mission and goals of the association
 - b. Know the objectives, priorities, and decision-making processes of the association
 - c. Familiarize yourself with AFE's programs and activities
 - d. Read AFE periodicals and publications
 - e. Key in on your role and specific responsibilities as a chapter leader
2. Learn to be a better communicator – to be a communicator you should:
 - a. Use commonly understood terms – make sure your audience understands your point
 - b. Listen with all your senses – listening is one of the most important things a good leader can do. Surveys show most people grasp only half of what is being said. You'll gain a lot more if you give the person speaking your undivided attention; maintain eye contact; watch for body language that may either support or contradict the verbal message; and don't interrupt
3. Stay informed of trends and developments that are likely to affect plant engineering and facilities management a few years down the road
 - a. To effectively lead you must be one step ahead of the rest
 - b. It's also important for you to keep informed of the priorities and opinions of other AFE members
 - c. These lead to a wide range of expectations about what direction AFE – and your chapter – should be taking
4. Be positive in your approach
 - a. Keep an open mind when a new idea is proposed
 - b. Consider that some companies insist that before a new idea is criticized, those involved in the brainstorming session must first state three positive things about it
5. Learn to be better organized – consider categorizing your work by the “four D's” of time management
 - a. Dropping – When you go through your in-box, throw out anything that doesn't fit with what you're trying to achieve. Any request not in line with your objectives should be given a standard even tactfully negative, written or verbal.
 - b. Delaying – Generally, never delay anything that will take you more time to do tomorrow than it will today. This is often the case with half-finished projects that once stopped will require you to again build up momentum. Delay low priority items until time when you are feeling less efficient or when you need filler work. You'll find that once delayed, many low priority items cease to have meaning and can be dropped completely.
 - c. Delegating – Many people hesitate because they believe that no one can do the jobs as well as they can. As a result, they get caught up in tasks that should be delegated to others and never get to many important matters.
 - d. Doing – Plan ahead by at least one day. Each day keep a “to do” list for the future. As you think of new things that need to be done, add them to your list. At the end of the day, see how many items can be dropped, delayed, delegated or combined...then update your list for the next day.
6. Eliminate Time-wasters

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- a. Don't attempt too much
 - b. Don't estimate time unrealistically
 - c. Don't Procrastinate
 - d. Don't Engage in reverse delegation which occurs when others bring you their problems to you to solve instead of solving themselves
7. Learn how to be more persuasive
- a. Arm yourself with factual documentation of your viewpoint
 - b. Make your associates want to believe you by appealing to more than their logic
 - c. The emotional side of persuasion involves
 - i. Establishing a rapport
 - ii. Take the time to talk with your colleagues
 - iii. Find out their interests outside the business world
 - d. Use Active listening
 - i. In meetings especially, this involves listening sincerely to an objection that is raised
 - ii. After the speaker is done, restate the person's point
 - iii. Deal with the objection from a point of mutual understanding – often, the objection goes away when the objector hears it restated

Breakdowns in Leadership

- Improper expectations
 - includes expecting too much from yourself...or not enough
 - members may expect too much...or not enough
 - they may expect the wrong things
- Lack of imagination – the larger the organization, the more difficult it is to be creative, dynamic and responsive to change
- Emphasis on the authority of leadership – “My way or the highway” doesn't work in a volunteer organization
- Failure to lead because you feel you don't have to lead
 - “We're doing as well as the next chapter” or “I'm doing as well as the next guy”
 - Real leaders don't accept the mediocrity of a “C” average
 - Leaders want to win, are excellent at instilling that attitude and are able to get great cooperation from others to achieve the desired results

Tips on Leading a Meeting (*more details in Book 5*)

- Anticipate the attitudes and positions of those who will be attending the meeting
- Organize materials in advance and know everything you want to say
- Avoid using distracting mannerisms when speaking
- Be prepared to consider suggestions and opinions pertinent to the matter under discussion

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- Keep the discussion moving along by asking a general question of the group or, if this fails, a specific question of a particular person
- Balance the discussion; don't let any single point of view predominate when others are to be heard
- Keep the discussion on track
- Break up controversies by injecting a little humor or by calling a short recess if necessary
- Finish the meeting on time
- At the conclusion make sure positive action is initiated. Never leave the meeting proud that you merely finished the agenda. State a conclusion, summarize the results and get the required action started

Developing Leadership

AFE's Chapter Leadership Workshops. These provide a good opportunity for chapter leaders to develop leadership talents and exchange ideas with AFE members from across the country. These one-half day workshops are scheduled during the AFE annual conference (*Facilities America*) and all regional conferences sponsored by the Association. Typical workshops include discussions on the AFE national organization, chapter organization, the duties of chapter officers, and chapter programming. Each session also includes time for an open forum discussion during which chapter representatives exchange ideas on membership recruiting and retention, programming, fund raising and financial management, motivating members, and more. These sessions are open to all chapter members at no charge. Current chapter officers and other members interested in serving AFE on the local, regional and national levels are encouraged to attend these informative sessions.

Other Development Opportunities. Whenever the leaders of various AFE chapters or other organizations meet, there is an opportunity to exchange ideas and information which will benefit your chapter. Other opportunities for leadership development include:

- AFE group meetings
- AFE regional meetings
- Chapter Leadership Teleconference calls (See Events Calendar for schedule)
- Joint meetings with other AFE chapters
- Joint meetings with other professional associations
- Seminars/workshops sponsored by employers
- Articles, reports and books on leadership development
- AFE sponsored webinars

The Chapter's Role in AFE

- Importance of Chapters
 - To many members the most important benefit of AFE comes from participating in the activities of the local chapter. Consequently, member participation, retention, and gaining new members are significantly affected by the quality of the programs at the chapter level. As John Naisbitt ("Megatrends") describes, the high-tech environment brings a growing, personal need...the need for "high-touch". Providing "high-touch" need fulfillment is a key role for chapters.

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- Comparative roles of National and Chapters
 - The high-tech, high-touch environmental factors help define the roles of both AFE National Office and the AFE chapters. While there is, and should be, enough overlap to assist coordination basically:
 - AFE National Office's role is to provide the "high-tech" information and programs. (Yes, there should be a degree of high-touch but the major emphasis is on high-tech)
 - AFE chapter's role is to provide fulfillment of the "high-touch", personal needs of the members. (Yes, there should be a degree of high-tech but the major emphasis is on high-touch)
 - The chapters don't exist just to support the national AFE (although that's important), nor does the national AFE exist solely to support chapters (although that too is important). Certainly both exist to support each other, but that's not the main reason for being in existence. The main reason the AFE National Office exists, and the chapters of AFE exists, is for a singular purpose:
 - To benefit members...and to do so requires...
 - A chapter/national partnership...this means...
 - A win-win-win relationship...chapters "win" and national "wins" because the individual members win!
- Member participation
 - The importance of active member participation is obvious...and this is equally true for participation at both the chapter and national levels of AFE. When AFE can attract only 10% of the membership to its series of conferences, things could be better. Likewise, when a chapter attracts only 22%-25% (the overall average among the AFE chapters) of its members to the typical chapter meeting, things could be better there too
 - In research study after study, across many types of associations, the facts say 50% of the members don't or won't participate. These are informally known as "checkbook" members; they belong just because they want to...or for some other reason than what most consider the direct, tangible benefits of membership. A second "given" is that the overwhelming majority of professional (individual member) associations – no matter how good these associations are in delivering solid, member benefits can't seem to attract (penetrate) more than 50% of the market for members. Applying these two statistical averages to the professional universe (total market for members), what we're really dealing with is a participation of 25% of the total market.

Summary

AFE chapters provide a key element in the total AFE membership benefit delivery system. The specific program emphasis of a given chapter, as well as the operations of the chapter, must be targeted to fulfilling identified needs of members in that chapter. (The exact member needs will vary somewhat from chapter to chapter).

A major role of all chapters is to help fulfill the special, "high-touch" personal needs which will continue to grow in an expanding, fast-paced, rapidly changing "high-tech" environment. The prime role of the AFE National

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Office is to provide the “high-tech” information and programs. Together – as partners in fulfilling total member needs and expectations – the AFE chapters and the AFE National Office form an unbeatable team.

Plan to Succeed

- “Planning is the Key to Success”. That may be an often-used expression but it remains accurate. AFE chapters that are most successful and exhibit the greatest ability to meet the needs of their members are the ones that have planned for their success.

No chapter plans to fail but too many chapters fail to plan. Taking the time to plan and organize every aspect of your chapter’s activities is the only sure way to get the kind of performance that will enable your chapter to achieve its goals.

- Organize to Plan

Successful planning doesn’t just happen. It is the responsibility of the chapter officers (the Chapter Executive Committee) to achieve the best possible results from the time and effort devoted to the planning process.

Realistically, leaders of the chapters will do most of the planning and practically all the decision making. However, every chapter member should be involved in some phase of the planning process. Member input can be used in the early stages of planning to determine needs and identify problems. Members should also be actively involved in developing specific programs and activities. This involvement helps to foster the feeling that it is “our plan” rather than “their plan”.

Here are seven tips which will help your chapter get the best results from the planning process. These will help you set the proper environment for successful planning

1. The greater the participation in the planning process the more involved the members will be in executing plans
2. Make use of former officers and senior members of the chapter. Use their experience and knowledge
3. Provide ample time for planning. Your goal should always be to complete your plan for the entire year prior to the first meeting of the administrative year
4. Make sure that those who are asked to plan have the authority to plan in their assigned areas
5. Planning can be a difficult task but not nearly as difficult a task as overcoming the problems caused when a chapter fails to plan
6. Remember that proper planning involves sufficient lead time; it’s an annual process
7. Use the planning information in this book 1. You’ll find that it will help you develop actionable and effective plans without an inordinate amount of effort.

Naturally, these tips are intended to highlight a few of the basic considerations involved in planning successfully. The “Six Planning Steps” which follow, being operational suggestions, are not intended to provide a conceptual framework for planning.

Six Steps to Basic Chapter Planning

The planning process is comprised of six basic steps. If you follow each step you will develop a comprehensive and workable plan. These steps should be applied when developing your chapter's annual operating plan as well as for specific chapter activities such as membership recruiting, programming, etc

Step 1: *Identify Member Needs*

The AFE Statement of Missions and General Objectives provide the overall purpose and primary objectives of the Association. Each chapter strives to achieve these by meeting the specific needs of the chapter members.

- Able to reflect progress
- Realistic
- Personalized

Obviously a chapter cannot hope to satisfy the needs of its members without first identifying exactly what those needs are. In addition to identifying the needs of the chapter members, it is important for the chapter to recognize its strengths and weaknesses.

Step 2: *Establish Priorities*

Once your chapter has determined the specific needs of its members and the specific strengths and weaknesses of your chapter's operation, it is time to establish priorities for an orderly plan of accomplishment.

When deciding which need, problem or task should be attacked first, several factors should be considered. Which is the most critical need or urgent problem (task)? Which will have the greatest impact on our chapter? Does our chapter have the manpower needed to successfully attack this problem? Does our chapter have the financial resources needed? In which problem (task) will be membership have the greatest interest and desire to work toward a solution?

When determining your chapter's priorities, it is always wise to seek the input of the entire chapter. Members will always be more willing to support priorities if they have been given the opportunity to determine them. These are best done through mail surveys, and then follow up phone calls to assure 90%-100% response. These results then make great discussion topics at a subsequent chapter meeting.

Step 3: *Set a specific goal for each priority*

Once your priorities have been set, the next step is to set a specific goal for each priority. The goal establishes what you wish to achieve in relation to each priority and defines a standard of measurement. To be effective, goals must meet six standards. They must be:

- Written
- Measureable
- Specific

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- Reflect progress
 - Realistic
 - Attainable
- A. Goals must be written. Writing goals is an integral part of the goal-setting process. When you place your goals in writing you help to ensure that they will be recognized and understood by every member of the chapter.
- B. Goals must be specific. The goal must be so specific that it can be totally understood. You cannot expect the members of the chapter to actively work toward a goal that they do not understand.
- C. Goals must be measurable. When a goal is set, it must include the standard of measurement and a specific end result. Examples of measurable goals are “the chapter will recruit a minimum of ten new members during the year” or...”Our goal is to achieve a minimum of 75% attendance at each chapter meeting”.
- D. Goals must reflect progress. Establish goals based on improving what now exists. Many of the priorities selected may not be completely reachable within one year, so set short- or long-range goals. In effect this is part of the strategic planning process.
- E. Goals must be realistic. Goals should be high enough to be challenging but not so high that the members feel they are impossible to accomplish. Goals must make your chapter “stretch” but be attainable with planned effort.

Step 4: *Select Specific Projects to Achieve Each Goal*

For each goal that is set you will need a specific plan of action for reaching that goal. For example, if the chapter has established a goal of at least ten new members, it will be necessary to develop a very specific plan to identify and recruit those new members. These projects (detailed, sequential plans) which you develop to achieve your goals become the chapter’s programs and activities.

When developing the chapter’s programs and activities, it is important to be creative and explore the various opportunities available. Don’t allow your chapter to fall into the trap of doing something just because that is the way it has always been done. Examine your current projects and methods to see if they can be modified or improved to reach the goal. Even though you should not automatically accept last year’s programs or methods, it is necessary to not reinvent the wheel every year. The trick is to see how they measure up and how applicable they’ll be to helping achieve the goals for the coming year.

Step 5: *Re-Evaluate Priorities, Goals and Projects*

Good management requires that every chapter constantly know where it is in relation to where it wants to go. Officers must frequently check to see if things are on schedule. Every chapter should re-evaluate its priorities and review the success or failure of its programming at least quarterly.

The chapter should never hesitate to drop a priority or project and replace it with another one that will better meet the overall mission and objectives. Good chapter management requires that goals and projects be fine-tuned throughout the year. In some cases, it may be necessary to raise or lower a goal

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to properly reflect the progress to date. Or, even better yet, make the proper revision in the “action plan” so that the goals will be met.

Particularly in planning for the future or in making the required “mid-course” corrections, don’t let the re-evaluation system be a “cop out”. Take a realistic look at each phase of the plan and see what changes are necessary. Don’t change just for the sake of change. At the same time, however, don’t be so “channeled” that you ignore a change in the desires of the membership. Tunnel vision will kill ultimate success.

Step 6: Evaluate Annual Progress

When the chapter officers evaluate the year, they should ask:

- What was our objective and did we reach it
- What goals did we set and did we attain them
- Where did we exceed any goals and why? And where did we miss our goals and why? In the planning process, specific/identifiable, measurable goals were established for each priority. The fact that our goals were measurable enables us now to evaluate our progress to date

Too often chapters simply list projects completed and activities participated in and call that an evaluation. If an evaluation is to be meaningful, it must concern “how well we’ve done” rather than “what we have done”. This evaluation of the results achieved vs. the original plan should be in writing. The written report serves as a foundation for next year’s planning effort. You will learn and gain through analyzing both successes and failures.

Organize for Involvement

Even the most elaborate chapter operating plan is doomed to failure if the chapter fails to organize its manpower to achieve the goals. Although the chapter officers have the primary responsibility for the management of programs and activities, the chapter will be successful only when every member is involved as an active participant.

When all the work is tackled by only a few members (often the officers), the amount of time and effort required can become too great. Eventually, these once-dedicated members become discouraged and seek to end their involvement in chapter activities. They just get burned out. It is also important to remember that most members want to make a positive contribution to their chapter. If they are not given this chance, they too can become discouraged.

The accomplishments of AFE are made possible through the efforts of its volunteer leaders. Good chapter leaders can get things done. Better chapter leaders get things done through the involvement of all members who have the desire to make a positive contribution to the chapter. Chapter officers must accept the responsibility for taking the time to teach others to manage chapter activities. It is often easier to do something yourself rather than to take the time to get others involved. However, it is important to remember that the long-term success of the chapter, and the Association, depends on current leaders who invest the time and effort to train their successors.

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Chapter leaders can take several steps to encourage greater member involvement in chapter activities.

Among these are:

- Make an effort to place every chapter member on a committee
- Make sure that every committee has stated duties and responsibilities. Each task assigned to a committee should make a positive contribution toward attaining a chapter goal. Avoid “make-work” projects.
- Use committees to boost attendance at chapter meetings. Make each chairman responsible for getting committee members to every meeting.
- Make sure that chapter communications (newsletter, etc) reach every member, not just those who are attending meetings.

Chapter Bylaws Help

Although every chapter is required to operate within the bylaws of AFE, it is important for each chapter to adopt a set of local bylaws. A properly drafted set of local bylaws can help the chapter run more efficiently by providing basic rules, regulations and policies.

If your chapter does not have a current set of bylaws on file, a special bylaws task force could be appointed. This group, working with the chapter officers, can then apply the “Bylaws model” to the specifics of your chapter. After the bylaws have been defined, they should be presented to the chapter members for approval and then forwarded to AFE; bylaws should be reviewed periodically to ensure that they reflect the current bylaws and policies of the Association.