

**EFFECTIVE NETWORKING: ENERGIZE YOUR CHAPTER AND YOURSELF**  
**Summary of workshop presented by Julie Lomoe, MA, MFA, July 27, 2008**  
**Biennial Conference of the Funeral Consumers Alliance, Seattle, Washington**

## **INTRODUCTION**

Welcome to the Effective Networking workshop. I'm Julie Lomoe, and I've been the administrator for the Memorial Society of the Hudson-Mohawk Region going on four years now. Our chapter serves the Capital Region around Albany in upstate New York. We were founded in 1964 and have over 1200 members.

## **ELEVATOR SPEECHES**

Before we go any further, I want to give you a chance to introduce yourselves. But I'd like you to do it a little differently than you normally would in a workshop like this. Imagine you're at a church coffee hour or a benefit for some charity, introducing yourself and your chapter to someone you've never met before who has no idea what a funeral consumer's organization or memorial society is all about. What would you say to catch their interest as quickly as possible?

This kind of communication is often called an elevator speech. Many marketers call it a one-minute commercial, and practice theirs at networking events, but it can be less than a minute, maybe just a couple of sentences. This is a tough one for me, and I confess I haven't perfected mine. How do you introduce the topic of funeral planning and consumer issues without casting an immediate pall over the proceedings? It's like the two mystery books I've published. *Mood Swing: The Bipolar Murders* came out two years ago. When I show them the book, people react positively, with interest in the title, and often start talking about people they know who are bipolar. *Eldercide* just came out – when I show them the cover, they tend to react with shock and dead silence. Interesting that people react in a more relaxed, positive way to the subject of mental illness than they do to death and dying.

(Group shares and discusses elevator speeches). Assuming you've sparked some interest, the next step might be to set up a one-on-one or relational interview. These are a powerful way of energizing ourselves and our organizations, and we're going to work on them later on in this workshop. But first we're going to explore our own networks by diagramming them on paper. We'll use my own variation of a technique drawn from sociometry. People have different names for it – sociogram, social atom, power analysis. In my former incarnation as an art therapist, I developed a more creative, colorful version.

## **SOCIOGRAM**

- 14" x 17" paper
- Crayons, magic markers
- Start in center – draw a shape to represent yourself – choose contours, colors to represent your mood, energy.

- Draw other shapes to represent people you work with in your chapter – again, use shape and color that seem to suit them. Can also write adjectives, descriptions, numbers: value to your organization, with 1 the lowest, 10 the highest. Space between you and them = how close you are.
- Add lines to depict your relationships: Gentle, wavy = good, harmonious; angular = contentious; none = communication break
- Continue outward into community. Include contacts and relations your board members have. Add FCA etc. Add all the ones you can think of, whether or not you have current relationships with them. Add lines, words. Get creative – don't be afraid to get a little wild.

**Discuss, share:** How does this make you feel? Do you feel supported, isolated, overwhelmed? What could change or needs to change? Could you use this sociogram exercise with your own board? There are many ways of reaching out to your network – through print and electronic media, doing presentations. Today we're less concerned with the ways to do outreach and more with stoking the energy, drumming up enthusiasm – the emotional component.

## CLUSTERING

This is a similar technique you could use as an ice breaker at board meetings, to help people get to know each other better using words, best described in Gabriele Lusser Rico's *Writing the Natural Way*. Demonstrate: put word or phrase in center – BOARD MEETINGS. Jot down other words as they occur to you, going outward like a spider web. When you reach an “a ha” moment, use the words and phrases to write a paragraph or two. Possible words: funeral directors, outreach, networking. Advantage: simpler in terms of materials; some people may feel more at home with words than diagrams. Could use for yourself when you're feeling stymied or frustrated.

## HOW TO FIND MOTIVATED BOARD MEMBERS OR VOLUNTEERS

**Background on the Memorial Society:** We were founded in 1964 as the Albany Memorial Society. We've grown slowly, mostly by word of mouth, to over 1200 members, and through new memberships and annual fundraising appeals, we manage to maintain a fairly healthy bank account. Members tell us they value the services we provide, but I have the nagging sense that we could and should be more dynamic.

Preparing for this workshop, I met and talked with people who served on the board, as well as people who have held my position over the years, all the way back to the woman who was secretary for the Unitarian church in Albany in 1964. She did the work for 10 years as part of her job description. Since then, we've had a series of very modestly paid, very part-time administrators.

I've learned that for over 40 years, a few dedicated souls have kept us going, but the majority of the board members have been only marginally involved. The woman who had my job in the late 1990's used to order in food, for which everyone chipped in, but the majority of the board members were older folks who lived alone. She suspected most of

them came primarily for the hot meal and the company, which is fine and dandy, but they didn't do any board work.

The woman who held the job before me said, "It's hard to be inspired when you're the only one doing anything." She also found dealing with death and dying to be depressing. Most staff and board people I've talked to have claimed that isn't a problem for them. Still, there was one board member who worked professionally in the senior community and had a great deal to offer in terms of expertise and contacts. But when a close family member died and another became terminally ill, she resigned because the issues we were dealing with were just too much for her. This is a topic that deserves more attention than we can give it here, but exercises like clustering or structured discussions around the topic might help board members deal more openly with it.

Most of our board members have joined because they were recruited by a friend. For example, one woman joined because I had been kind and welcoming to her when she first came to our Unitarian Universalist congregation. But although we have a group of congenial, interesting people, we haven't had a formal selection or vetting process by which we determine upfront what skills and experience people bring to the organization as well as the time and energy they're willing to commit. We have some ideas on how to change. We plan to convert from a (c)(4) to a (c)(3) corporation, and this will open up more opportunities for donations and funding. And a board member who was elected last year has extensive experience in strategic planning for a variety of New York State agencies, and she's offered to run a board retreat where we explore our mission and future plans. But we also need some fresh blood on the board. It's a catch-22 – we need energy and enthusiasm to attract new people, but we need new people to help ratchet up our energy.

**Discussion:** Can anyone relate to this? Any suggestions? What's worked for you? How do you recruit new people?

**Research:** I've put together a list of resources that might be valuable to you and your organization [see end of article]. By far the best thing I found is an article by Laurie Powsner, Executive Director of the FCA of Princeton, entitled How to Build A Better Board. It was posted on the FCA website just last Friday. I didn't turn up much in the local libraries or bookstores, but I did a lot of Googling. You might be interested in the number of hits I found:

- Not-for-profit board recruitment – 155,000
- Volunteer recruitment retention – 1,280,000
- Volunteer motivation – over 4 million
- Networking – 289 million!

## ONE-ON-ONES

Obviously, motivation is key. This is where one-on-one or relational interviews come in. You're looking for people who have passion and leadership potential. An article on leadership and participation from "The Community Organizing Toolbox" says,

“Organizers call the work they do to involve people ‘base-building.’ It is continuous and challenging. Base building is recruiting and engaging new people, keeping current members motivated and involved, and deepening member participation...must have qualities like heart, hope, persistence, resilience and energy...continuously making room for new people.”

Many community organizers consider one-on-ones the most powerful tool they have for building organizations. In the book *Roots for Radicals*, Edward T. Chambers says that in relational interviews, “You’re searching for talent, energy, insight, and relationships; where these are present, you have found some power to add to your public collective.” Chambers is head of the Industrial Areas Foundation (IAF), the oldest and largest institute for community organizing in the U.S. It was founded in 1940 by Saul Alinsky. Another organizing institute that came from Alinsky’s training and uses similar techniques is the Gamaliel Foundation. That’s the organization where Barack Obama got his basic training in community organizing – not too shabby, right?

In one-on-one interviews, you’re looking for what turns people on – a gleam in the eye, an increase in energy, emotion, whether tears or anger. I’ve prepared a handout with tips on conducting this kind of interview. [See end of article.] I’m by no means an expert at relational interviews, and I still feel somewhat daunted by them. On the Myers-Briggs, I’m an introvert. But I find they energize me. Since starting them, I’ve been meeting some fascinating people and broadening my horizons – I think you’ll enjoy them too.

**One-on-One Practice:** Pair off with someone you don’t know. We have a built-in advantage – we know everyone here is intensely interested in funeral consumers’ issues. But for the next few minutes, I’d like each of you to get to the root of WHY the person you’re interviewing has this interest. Probe for personal experiences – maybe something that happened to a family member, or some experience with the funeral industry that really made them angry. As the tips say, cut to the chase. I’ll be the timekeeper – we’ll give each person five minutes, and I’ll tell you when it’s time to change. Then you’ll have another five minutes to give each other feedback. After that, we’ll share as a group.

**Discussion and Conclusion:** Having board members do one-on-ones with each other at a meeting is an excellent way of energizing your chapter and yourself.

## ELEVEN TIPS FOR ONE-ON-ONE/RELATIONAL INTERVIEWS

**Be selective.** Don't meet with just anyone. Look for potential leaders, people who relate well to others and/or have specific skills your organization needs. They should have a strong interest in funeral consumer issues and connections in the wider community.

**Limit the time.** Meetings should last from 30 to 45 minutes. Mention the time limit in advance. If there's more to talk about, schedule another meeting. The time limit helps keep the energy focused.

**Choose the venue.** If someone invites you to meet at his or her home or office, great – their surroundings may provide cues that tell you more about them and suggest questions you can ask. But offer the option of meeting in a public setting, like a coffee shop. Breakfast meetings are an energizing way to start the day.

**Open with questions.** If necessary, you can begin by briefly discussing the purpose and parameters of the meeting. Then you might move to questions about where the person is from, family, childhood memories, education, what gives them the most satisfaction. But then –

**Cut to the chase.** Relational meetings aren't casual chit-chat. Your goal isn't to sell them immediately on membership or affiliation with your organization. Instead, you're searching for the person's core, their spirit, what makes them tick. Look for the personal stories behind their public persona, for talent, passion, vision and energy.

**Bring your whole self to the meeting.** Make sure you're well rested, energized and "on." Go into the meeting with focus and intensity. Have a repertoire of stories that help explain your commitment to your work, but keep the focus on the other person.

**Take chances and step outside your comfort zone.** Don't be afraid to be confrontational and pose tough questions. Chambers says, "In relational meetings, the "why" questions so often avoided by people have a space in which to surface." He adds that this type of meeting "necessitates probing and agitating the depths of the other" and "demands a measure of vulnerability on both sides." (*Roots for Radicals*, pp. 49-53)

**Ask for connections.** Who else does the person know whom you might be able to meet with? These contacts can turn out to be valuable – be sure to ask about them and take down names.

**Evaluate the meeting afterwards.** Would this person be an asset to your organization? What are their passions? Their skills and limitations? Take notes and make plans for follow-up if any.

**Practice, practice, practice.** Skilled organizers do dozens, even hundreds of these meetings, yet each meeting is unique. Many describe relational meetings as an art form that gets easier with practice. Do at least three a week and watch your network grow along with your expertise.

**Enjoy the energy.** After a stimulating meeting, you'll probably come away feeling energized and replenished. Even if the person isn't a good match for your organization right now, you will have expanded your network and maybe gained some fresh ideas. If the meeting falls flat, chances are the person wasn't right for your organization anyway. Move on and schedule another meeting.

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Funeral Consumers Alliance National Conference, Seattle, Washington, June 27, 2008

### **RECOMMENDED RESOURCES**

#### **Networking**

*Masters of Networking: Building Relationships for Your Pocketbook and Soul*, Ivan R. Misner & Don Morgan, Bard Press, 2000. (Sales-oriented anthology but has good resource list.)

*Work the Pond! Use the Power of Positive Networking to Leap Forward in Work and Life*, Darcy Rezac, Judy Thomson & Gayle Hallgren-Rezac, Prentice Hall, 2005. (The folks who trade-marked Positive Networking™. An easy, entertaining read.)

*Momentum: Igniting Social Change in the Connected Age*, Allison H. Fine, Jossey-Bass, 2006. (Networking in the age of cyberspace. Note: this publisher, [www.josseybass.com](http://www.josseybass.com), also has excellent books on strategic planning and board development.)

#### **Volunteer and Board Motivation and Recruitment**

“How to Build a Better Board,” Laurie Powsner, FCA website [www.funerals.org](http://www.funerals.org), June 20, 2008. (Best article I’ve found on this topic.)

“Determining Volunteer Motivations – A Key to Success,” Riley, Schott & Schultinik, Michigan State University Extension, [msue.msu.edu](http://msue.msu.edu). (Interesting theory on volunteer motivation as related to McClelland’s descriptors of Achievement, Affiliation and Power.)

*The Volunteer Recruitment Book*, Susan J. Ellis, Energize, Inc., 1996. (Ellis also has an excellent website, [www.energizeinc.com](http://www.energizeinc.com), with a newsletter and extensive archive of article links.)

“Tips for Recruiting and Managing Older Volunteers,” Leah Kerkman, The Chronicle of Philanthropy, 2003, [www.philanthropy.com](http://www.philanthropy.com) (Good overview.)

#### **One-on-One and Relational Interviews**

*Roots for Radicals: Organizing for Power, Action, and Justice*, Edward T. Chambers, Continuum, 2003. (See Chapter 2, “The Relational Meeting.” Chambers is the Executive Director of the Industrial Areas Foundation, [www.industrialareasfoundation.org](http://www.industrialareasfoundation.org), which offers 10-day trainings for community organizers.)

The Gamaliel Foundation, [www.gamaliel.org](http://www.gamaliel.org). (The organization that trained Barack Obama in community organizing. Their seven-day leadership trainings include exhaustive practice in doing one-on-ones.)

“10 Rules for One-on-Ones/Relational Meetings,” The Center for Community Change, [www.communitychange.org](http://www.communitychange.org). (Excellent overview, more radical than my 11 tips.)

“Leadership and Participation: How CO Groups Work,” The Community Organizing Toolbox, [www.nfg.org](http://www.nfg.org). (Good overview of base-building and community organizing.)

#### **Creative Writing and Inspiration**

*Writing the Natural Way*, Gabriel Lusser Rico, 2<sup>nd</sup> Edition 2000, [www.gabrieleric.com](http://www.gabrieleric.com). (Clustering and other ways of jumpstarting your creativity.)

*Eldercide and Mood Swing: The Bipolar Murders*, Julie Lomoe, Virtualbookworm, 2008 and 2006 respectively. Check out my mystery novels by visiting my website, [www.julielomoe.com](http://www.julielomoe.com). Both can be ordered on Amazon or through [www.virtualbookworm.com](http://www.virtualbookworm.com). *Eldercide* should be of special interest to FCA members, since it explores highly topical end-of-life issues. For more information, e-mail me at [jlomoe@nycap.rr.com](mailto:jlomoe@nycap.rr.com).