Expecting the Unexpected—How Leaders Build Strong SPTAs

State Leadership Conference
February 27-March 1, 2016
Wide Range of Structures

- Very small to very large
- Full time Executive Directors, part-time Execs, and Association Management Companies
- Variety of governance structures
- One-person offices to fully staffed offices
What Spells Success?

- Staying focused on priorities
- Finding good volunteers
- Volunteers who fulfill their responsibilities and roles
- Good fiscal management
- Good organizational management
- Great communication with our members and with each other
Key Thoughts for an SPTA Executive

- Consider “How we are going to be together.” Have that discussion with the President early (and often)
- Remember that old news to us is new news to new Board and Committee members
- Be respectful, consistent, and politely persistent (and make sure the staff is also)
Key Thoughts for a Board Member

- It’s a two-way relationship
- Be willing to hear bad news, work on resolutions, and move on
- Appreciate time required to do the work
Essential Thoughts for an ED

- It’s a two-way relationship
- There is no “us” and “them”—only “we”
- Appreciate the wealth of expertise on the Board, and use it
- Never hide bad news (or any news)
- Pay attention!
- Remember…our leaders have day jobs!
Successful Board Members…
(the ones we love the most!)

- Consider the big picture—lending expertise to thinking and talking about *mission, guiding policies, and procedures*.
- Understand that the Board represents “ownership one step down, not management one step up” (John Carver).
- *Do tell* the CEO what *result* to achieve.
- *Do not* tell the CEO how to run the organization.
It Takes Two to Tango…and Sometimes More
The “Sauce” That Makes it Work

- Trust
- Flexibility
- Inclusiveness
- Calm
- Willingness to listen
- Sense of humor
- Trust
Big State vs. Small State

- Common Themes
- Board/President Role vs. Role of EV/CEO
- Role of President-Elect
- Volunteer Management
- Efficient Board Meetings
- How to Make an Idea into Action
Board/President vs. ED/CEO

- Policy Administration
- Finance
- PR/Community Relations
- Program
- Personnel
- Evaluation
<table>
<thead>
<tr>
<th>Function</th>
<th>Board/President</th>
<th>ED/CEO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Administration</td>
<td>• Establishes</td>
<td>• Implements and recommends</td>
</tr>
<tr>
<td>Finance</td>
<td>• Approves and monitors</td>
<td>• Drafts and manages</td>
</tr>
<tr>
<td>Program</td>
<td>• Approves program initiatives and goals</td>
<td>• Develops and implements</td>
</tr>
<tr>
<td></td>
<td>• Plans for future</td>
<td>• Recommends new directions</td>
</tr>
<tr>
<td>PR/Community Relations</td>
<td>• Represents the profession or organization</td>
<td>• Represents the profession or organization</td>
</tr>
<tr>
<td>Personnel</td>
<td>• Hires and evaluates ED/CEO</td>
<td>• Hires and evaluates all staff and consultants</td>
</tr>
<tr>
<td>Evaluation</td>
<td>• Approves measurement criteria, process</td>
<td>• Recommends measurement criteria, process</td>
</tr>
<tr>
<td></td>
<td>• Monitors status reports</td>
<td>• Develops reports</td>
</tr>
<tr>
<td></td>
<td>• Assesses service and funding needs</td>
<td>• Prepares data, analysis of service and funding needs</td>
</tr>
</tbody>
</table>
Role of President-Elect

- You’ve been elected, now what?
- Learning curve
- Job description
- Job shadowing
- Increased communication with ED/President
- Planning
- Are you ready?
Volunteer Management

- Time is precious
- Time is money
- Job descriptions
- Clear expectations
- Project based or “bite-size”
- Show value
- Give thanks
Efficient, Effective Board Meetings

- Again, time is precious (and money!)
- Consent agendas
- Focus on initiatives
- Obtain buy-in and stakeholder/diverse support
- Use strategic plan as a road map
Ideas into Action

- Follow proper channels
- Has this been done before?
- How will we evaluate?
- Gain support
- Make a plan
- Be flexible
- Does this unite? Is it feasible given the current resources?
Question, Comments, Concerns?