

What Keeps Association Managers Up at Night?

By Sarah B. Hood

Apart from the daily round of requests, deadlines and issues that need careful handling, what are the pressing matters that are always on your mind, keeping you from getting a good night's sleep? On November 21, the Trillium Chapter hosted an all-day event that gave us the opportunity to ask a few leading association executives that question and to learn their best advice for dealing with these tricky, sleep-stealing matters effectively.

Each of our speakers chose a different topic, but there was strong correlation among all four perspectives. Whether they're board members, staff or volunteers, the people we work with are our greatest asset... and when things aren't running smoothly, they can cause our biggest headaches. Above all, our four experts agree, learning how to manage our relationships with the people around us skilfully is the surest cure for work-related insomnia.

Keeping the Board On Board

Diane J. Brisebois, CAE, President and CEO of the Retail Council of Canada, offered her thoughts about board relations and how to make sure elected officials remain focused on the strategic direction of the organization instead of micromanaging staff.

Even experienced board members often misunderstand the nature of their role and the function of staff: "The board member has been elected to serve as your strategic barometer and your governance body, to ensure the organization is delivering on its goals and objectives. Association executives have been hired to run the business for them full-time," Brisebois says.

No two boards are exactly the same. "The way board members are trained has to be appropriate for the sector they represent; there isn't one perfect formula," she says. Nevertheless, some constants apply, and Brisebois learned one of them the hard way. When she first became an association executive at the age of 24, she naturally gravitated towards likeminded people. Eventually, she realized that, instead of picking board members for their compatibility, she should have been choosing people with the skills the organization needed most: "You have to work with your current board or an outside firm to develop the set of competencies that are required to build a strong board. And then, training, training, training!"

A consistent training approach builds respect from board members and "allows the board to be more engaged, better prepared and clearer about what is expected of it." But what about those situations when the board—or just one person—is micromanaging staff into the ground? "Usually, even in dysfunctional boards, there is someone who feels something is wrong with the dynamics, so try to find one or two board members who are sympathetic and can be your advocate," Brisebois suggests.

"Board members don't usually do this because they're mean-spirited; this is how they run their business or their personal life, and they assume this is what they should be doing on the board," she says. Occasionally, the situation can get so far out of control that it can't be fixed internally,

and it becomes necessary to hire outside help. In these cases, says Brisebois, “Don’t be cheap; get the best! Bring in someone with a good track record, because you don’t have a lot of kicks at the can.”

To ensure it never reaches that point, Brisebois suggests it’s important to study interaction and listen to questions asked; absorb constructive criticism and constantly perfect these skills. Sometimes being outside looking in is more valuable than being part of the gang.”

Trust: Make It or Break It

Jim O’Brien, Executive Director, Ontario Branch for The Kidney Foundation of Canada, discussed the broad sweep of organizational culture as a whole. Working in the charitable sector “we don’t manufacture widgets. We’re essentially an organization of people, and the people aspect really is our by-product, so for successful leadership, the relationship component of dealing with people is paramount,” O’Brien says.

For boards and staff, and especially for volunteers, “it goes back to the need for building or establishing trust that allows us to take people to places we haven’t gone before,” he says. Luckily, most people “start off with a high degree of trust that you will lead the operation in the direction that the board would like to see. It’s up to you to continue to build on this trust capital.”

With volunteers, the key is “to be transparent about what’s happening inside and outside the organization in such a way that the volunteer is knowledgeable about the risks and opportunities and feels confident in that understanding,” he says. “It’s when people don’t have the confidence to share that the volunteer starts losing trust.”

It can be a mistake to try to shield people too much from the political aspect of the job. “Sometimes you need to share the political dynamic,” says O’Brien. “That’s not negative, that’s a reality. It’s important to fully engage the organization in the positive expression of the political.”

For instance, in a national organization such as his, “you may have layers in the organization. There can be community level politics with the provincial offices. That’s a sharing of power, and when you share power there’s a natural political dimension. You have to allow that expression of engagement to occur in a planned way, because if you don’t, it’s going to occur anyway.”

This goes hand in hand with articulating a clear shared vision for the organization, as well as “another vision statement that people forget: the vision statement of your organizational culture. How does it feel when it’s working well?” The Kidney Foundation has “spent a lot of time talking about what it means to be one organization” and the implications for internal culture, including language and behaviour, O’Brien says. “It’s a very important conversation to have.”

Getting Governance Right

Dr. Bob Haig, Chief Executive Officer of the Ontario Chiropractic Association, focused on the basics of governance. “It’s really about making sure that the organizational basics are right,

because trying to deliver the kind of quality programming that the board expects with a flawed delivery system is not going to work,” he says. “By that I mean who does what, who has authority for what, and having staff working together properly as a team.”

The Ontario Chiropractic Association has gone through “some pretty significant transformations that have allowed us to be really productive,” he says. “In the first year we took budget development out of the hands of board committees and turned it into a staff function. In the second year we did a complete governance overhaul, so we ended up with five committees instead of 22, with an appropriate division of responsibilities between board and staff.”

To accomplish some of these changes, Haig gave the board a questionnaire about the annual conference, asking straightforward questions such as who had responsibility for various functions. “It was very clearly demonstrated that the members of the board didn’t know and didn’t agree,” he says. “The key was getting them to realize that there was a better way, and that the current system was broken.”

The process did require the use of a consultant. “There’s no way we could have made the transformation that we did without outside, expert advice,” Haig says. It was also an exercise in trust. “It was a pretty dramatic shift in governance. The only way we could do it was because the board trusted that I wasn’t going to do things only for my own benefit.”

Maintaining these changes requires further work. “It’s all about quality of relationships,” he says. “I make sure I’m communicating with the president, the vice president, and the key committee chairs all the time, seeking and giving advice. Every couple of weeks I send an update to the board and it’s amazing how much they appreciate it. I’m part servant and part leader; if the board doesn’t see it that way, you can never get anywhere.” In addition, with staff, “we’ve had to systematically and creatively create a workplace that people want to be part of,” Haig says. “We engaged in an organizational values-setting exercise, and then we did a norm-setting exercise to determine what normal behaviour is here, and asked how this reflects our values.” The result was a new performance management system endorsed by staff and management based on a system of cascading goals that allows everyone in the organization to understand how their part fits into the whole.

Above all, he says, “appropriate governance and an effective administration are the rails on which the train of programming runs. You can’t move forward unless you’re on a solid track.”

Balancing Focus and Achieving Consensus

Cheryl Paradowski, CAE, President and CEO of the Purchasing Management Association of Canada, chose to discuss two different things she’s learned in her position, both of which are concerned with managing relationships, helping members understand the work the association is doing, and making sure board members feel part of decision-making.

Paradowski has been with her association just over two years. “In the first year, we were very inward-looking; in the second, we were very outward-looking,” she says. In her first year, the association had just “come from a significant change in our designation program and even a

change in the name of our designation. We put a lot of effort into developing the content and marketing of the program; we also spent time on governance mechanisms,” she says.

The focus on these infrastructure matters was necessary and held value aspect really is our by-product, so for successful leadership, the relationship component of dealing with people is paramount,” O’Brien says. For boards and staff, and especially for volunteers, “it goes back to the need for building or establishing trust that allows us to take people to places we haven’t gone before,” he says. Luckily, most people “start off with a high degree of trust that you will lead the operation in the direction that the board would like to see. It’s up for many members, but it wasn’t easy for the board membership to understand how much work was going into it. And not all of them appreciated the narrow focus. In the second year, a major member survey led the way for addressing the imbalance with three, more outward-focused projects. One of these was a communications action plan that included webinars, e-blasts, newsletter articles and a set of regional speaking engagements for Paradowski.

The second—“a personal project for me”—was an employer outreach campaign that saw Paradowski travelling across the country to meet with employers of the membership to talk about the designation, because, although there had been so much work put into revising it, “the members didn’t think we were doing enough to promote their designation,” she says. “Based on the response that we’ve received to this outward focus, members now believe the association is energized and things are starting to happen,” says Paradowski.

There was also a remote member focus group, designed to find out what could be done to offer better service to members in remote locations who can’t always attend association functions. Some very simple and straightforward solutions emerged, like using the existing database to help members link up with others—even one or two—who live and work near them.

However, “you do have to do the inward-focused work in order to have the correct support mechanism for the outward-focused projects,” she adds. “One of the reasons I had focused on the inward side is that the majority of associations in Ontario are about to go through major changes to conform with the requirements of the new Ontario *Not-for-Profit Corporations Act*, which is likely coming in July.

Paradowski’s second piece of shared experience had to do with consensus building. In the course of building a new funding model for the association, staff carried out their research and “came up with what we called a ‘draft model’” for board approval. However, she admits “in hindsight, it wasn’t a draft; it was what we expected to have accepted. But it wasn’t!”

Paradowski and her staff had to start over and create five possible scenarios for board consideration. This time, “we got much more buy-in, and a process that had previously taken us 18 months without success was successfully accomplished in four.” The only true difference with the second approach was allowing the board members to feel they were a part of the decision-making; just one more example of how building good relationships can rake the stress out of association work!

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