

# **What the Executive Director of a very small organization needs to know**

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## **So, what is it?**

Mostly, it's the culture.

Very small organizations are usually volunteer-driven and have limited financial resources. They may operate from somebody's home or office. They often don't have a space of their own.

The Board members are passionate about their industry, profession, or cause, and think of themselves as content experts. They do all the work of the group and they do it the way they are accustomed to doing things. There's often no money to hire anybody.

You are an outsider. You are "the help." You have been hired (but probably aren't paid a lot) to do the things they don't have time to do or they don't want to do. And they expect you to be able to handle problems that they can't, or won't, take care of themselves.

You may be the only paid staff person in the organization. There are no departments, no HR person, no consultants, and no such things as technology audits. There may not be any outside contractors, either.

The other people who work for the group are volunteers, and they don't always possess the expertise needed to do what they have agreed to do. But they are tremendously supportive of the organization and will do the very best they can. They mean well.

You can advise them but you cannot direct them. You cannot tell them what to do, how to do it, or when to do it. You can offer suggestions, and those are most likely to be followed if delivered gently, respectfully, and deferentially. You are not their boss and they don't have to listen to you.

The organization was probably very small when it was started, perhaps launched by a tiny group of people who cared a great deal about the profession, the industry, or the cause. They may have emerged from a larger group they felt was not devoting enough attention to the issues or sub-disciplines that concerned them or that it wasn't sufficiently addressing matters that touched them personally. So, they started a new organization.

The mission may never have been spelled out, but they all felt they knew what it was.

Everybody was a volunteer at the beginning. They believed that doing the work of the organization was more important than anything else. If they spent their time writing Bylaws, drafting vision statements, or establishing decision-making processes, as some association professionals might have told them they should, who would do all the work?

So, the Board of Directors evolved into a gathering place for committed members who were willing to accept official authority for the group's actions and who were willing to do all of the work. It was comprised of doers more than thinkers. Being able to devote time to operational tasks became the primary criteria for Board service.

The Board still doubles as an unpaid staff and it gives priority to operations, not to governance.

## **Your Role**

Board members may think of an Executive Director as a “helper,” not as a CEO. They want an efficient worker, not a management czar. And they’re not really interested in a strategic thinker. They’ll do the strategic thinking themselves, if they feel it needs to be done at all, and they’ll decide what activities the organization will engage in.

They don’t want somebody who will disagree with their policy choices or criticize the manner in which they make decisions. They simply want somebody who will do what they think needs to be done and who will do it well.

The Board President may function as the CEO or there may not even be a CEO. Board members may view themselves as equals and gather around the kitchen table to divvy up the duties they think need to be performed. One member may grudgingly accept the role of President, but only for legal or organizational reasons. That person usually won’t be thought of as the leader of the group, but simply as the person who chairs the meetings, is listed on important documents, and represents the organization to the outside world.

If you conduct yourself in too assertive a manner, as might be appropriate in a larger organization, you may be viewed as an interloper who is imposing your will on their group. It’s as if you are demanding the keys to their house and telling them that you know best how everything should be done inside.

Well, they think they know best and they want to do things their way (as much as possible). They may even have mixed feelings about letting you, and your professional attitudes, into their organization.

To them, association management is just another skill, and they’d really like it if one of their people possessed that skill. Then they wouldn’t need the help of an outsider. They’d have

an Executive Director who shared their beliefs, their biases, and their work habits. The fact that they had to hire you might mean they were unable to find one of their own who could, or would, do the job.

Some may also be confused by the nomenclature and wonder why you think your position is so important.

In universities, hospitals, and many businesses, an Executive Director is merely a department head or a project director. The Executive Director of a Wellness Program, for example, may report to the Director of Community Affairs, who reports to the Marketing Director, who reports to a Vice-President, who reports to the Hospital President.

The Executive Director of Engineering Services may actually be the head of the Janitorial Department. To them, being an Executive Director is not a big deal

Be sure you know what the Board members want before you go to work for them. And make sure you are in agreement about your role and your duties.

By the way, they may not want to give you an employment contract. That is too formal for many of them. And they may not have access to an attorney who will draft or review a document free of charge. So, negotiate the terms of your employment with them and codify it in a letter of understanding. But don't expect a signed contract.

### **How they do things**

Many Board members do not understand the difference between making decisions and implementing decisions. They do both, and often believe that implementation is the far more important duty, so that becomes their organizational job.

Board members often do things the way they do them at work. Corporate executives make big decisions and expect others to handle the details. Entrepreneurs make big decisions and handle the details themselves. People who don't make decisions at work often make them collectively in organizations and are loathe to grant decision-making authority to any individual.

In one organization, the person who had proofread the group's quarterly publication for the previous six years asked for a raise. Eight people were involved in the discussion about whether she should be given one and, if so, how much. The Executive Director was not one of those eight.

Committees often function more like staff. The Marketing Committee is the de facto Marketing Director. The head of the Technology Committee may have more tech expertise than other members but not enough to be an IT Director. But that person, and the committee, will act like one, anyway.

Committees and individual Board members may do things on their own, without first obtaining Board approval for their work. Their colleagues may even thank them for their unapproved actions, grateful that somebody had thought of something and took care of it without waiting for the matter to sneak up on everyone else.

They may regard Bylaws requirements as invasive and unwelcome. They may ignore meeting notice deadlines, election procedures, and term limits that are outlined there. They may feel those regulations interfere with their ability to do things the way they should be done. They only adopted them because somebody they were willing to listen to told them they had to.

The “leaders” of the organization are not unintelligent or irresponsible. In fact, they may be masters in their fields and deeply committed to the work of the group. They just want to make sure that important tasks get done and are not sidetracked by “bureaucracy.”

They usually have jobs that limit the time they have available for organizational work. That’s why they need you. To do for them what they would like to do themselves but can’t.

### **Getting started**

Don’t try to get the organization to do things the way you think they should be done. If you follow that route, your tenure may quickly come to an end.

First, demonstrate your ability to get things done. Become known as an expediter, not as a change agent (unless they tell you they want you to change things). That will help you gain their respect, their trust, and their recognition of the value of your skills, which will make it easier for you to change things later on.

Start by identifying tasks that are not currently being carried out properly or even at all. Send out membership renewals in a timely fashion. Prepare and disseminate the newsletter and other communications on time. File IRS documents when they are due.

Address tasks that may have been neglected because those responsible didn’t have the time or the knowledge to do them, or because nobody thought they were important. Establish the practice of adherence to Bylaws requirements for Board and committee meeting notice.

Try to nudge active members into roles where they can utilize their substantive knowledge of the industry, profession, or cause. They are content experts and are likely to feel most comfortable, helpful, and motivated when working in the areas of education, publications,

or research. That will enable you to focus on administrative and operational issues, where you excel.

Help them learn how to tackle membership recruitment and renewal tasks, too, so members and prospects can connect with peers, not with a “hired gun” like you.

Listen to what Board members tell you. Some may not like the way the organization has operated in the past but they won't voice their concerns to their colleagues because they don't want to hurt anybody's feelings.

They'll share their thoughts with you, though. That will help you decide when and how you can slowly begin changing things, knowing there will be a receptive audience down the road. But don't move forward too quickly. The people who said they agreed with you won't support you right away. They'll stick with the old guard – their colleagues - and not back you up. Remember, you are an outsider.

## **Board Meetings**

They usually consist of reports, mostly from committees. Sometimes committees meet only to be able to report that they met. They tell what they talked about and occasionally make recommendations for Board approval. The meeting is all about making sure everybody did what they said they would do and what they were supposed to have done.

Most Boards fail to chart their progress in meeting organizational goals, and that's especially true of small groups that are dependent upon Board members to do the work of the organization. They have neither the time nor the desire (or sometimes the know-how) to think about anything besides the work they are doing.

You need to find a way to inject a more strategic agenda into Board meetings, so the organization can be sure it is moving in the right direction. Keep in mind, though, that even groups that favor that approach still like to hear committee reports, so you may have to include those, anyway.

You probably can't make this kind of change on your own. You'll have to persuade the Board President that it should be done. Suggest adding a discussion of the organization's strategic goals at the end of the agenda, and explain why that is so important. (If those goals aren't written anywhere, write what Board members probably think they are).

That discussion will force people to switch from their "doing" hats to their "thinking" hats, and help them recognize those are two different roles. It may improve alignment between strategic goals and operational practices. And it may give you another opportunity to assume responsibility for operational issues.

You also have to ensure the Board discusses the financial impact of its decisions. You may even have to convince it to adopt a budget. Some groups don't feel it necessary to have one. They simply spend money on what they think is needed now and don't think ahead about what might be needed later on.

But if the organization continues operating that way, it will eventually run out of money (but Board members may not believe that will really happen). So, when proposals are made, ask questions like, "How much will that cost?" or "Where will the money come from?" or "Has this been budgeted?" Ease them into discussions of financial needs.

Be aware that many Board members have higher annual incomes than does the organization. The concept of not having enough money for something may be alien to them.

You will also need to establish spending priorities, and some Board members won't want to do that. They may think the organization should do "everything." But if the resources don't exist to do "everything," they'll have to decide what will get done first. That may be a no-brainer to you, but it isn't to them. They may not want to abandon "worthy" projects.

So craft a mini-strategic plan, of sorts, that includes "everything," but list items in priority order. That way, you can acknowledge the importance of "everything" while focusing the organization's meager resources on the things that are "most" important.

It may not always be possible to hold in-person Board meetings where you can discuss these matters face-to-face with Board members and convince them to follow your recommendations. You may have to set up teleconference calls, instead, which are less personal and limit your ability to read physical cues and smoothly converse.

Whatever meeting mode you choose, though, be prepared to deal with problems.

Younger Board members often cannot attend meetings during work hours. Nor can other people who are not in control of their work environment. Those who conduct classes or hold appointments often lack scheduling flexibility. In some professions, employees aren't allowed access to cell phones when they are working outside their offices. And consumer members may always want to meet after work.

So, find a time, or times, to meet and publish those far ahead of the meeting date, so Board members can adjust their schedules, when possible, to attend.

If you opt for videoconferencing, give members time to adapt to what is a new format for many of them. Neither you, nor they, have coaching resources that can accelerate that process.

Those with less technological experience will need more time to learn how to login, how to talk to other Board members, and how to share documents.

Beware of hybrid meetings, where some people are in-person and others online. Meeting dynamics will be different for each of them, making information exchange even more difficult. And communication devices may interfere in unexpected ways – like generating echoes and unwanted noise in a meeting room. Problems that normally occur in any setting will be worse for your organization.

## **Realities**

Board members may be experts in their fields, but they are usually not experts in organizational management. Still, they are accustomed to having to make decisions about matters with which they lack familiarity, so they go forward, anyway:

- The volunteers in one organization recruited a well-known author to conduct a book signing at the annual meeting. Three days prior to the event, the author asked when the books would be delivered. They had no idea what she was talking about. Doesn't she bring them? No, she doesn't. The books have to be ordered from the publisher, who owns the book, the author shows up to sign the ones that have been sold, and the remainder are shipped back to the publisher when the meeting is over. It was too late to do that. The meeting was held in the city where the author lived so she brought the twelve books she had in her home. That was the book signing – twelve books.
- Another organization recruited a keynoter who spoke while seated in a wheelchair. It knew that but it didn't occur to anyone in the group that he needed a way to get up to

the onstage podium. It wasn't until the hall was being set up for the meeting that the hotel saw the problem and brought in a wheelchair ramp.

- Numerous organizations call hotels and restaurants to give them a “heads-up” about how many people might attend a meal event, not realizing they are issuing a guarantee when they do that. They are surprised when they receive a bill for all those uneaten meals.

Politely offer to take care of things like these for your organization. Tell the Board that you are familiar with the peculiarities and oddities they encounter and that you know how to save them money. That will present you with a key opportunity to gain responsibility for association operations.

### **Strategic Relationships**

Board members know their organizations are small, but they don't always realize how much that matters. The President of a group with a \$100,000 budget didn't understand why others thought of his organization as less significant than one with a \$42 million budget. To him, both groups represented their professions and should have been treated equally.

To improve that situation a little bit, you may choose to ally with a larger organization that can benefit from your relationship and may be willing to do some things for your group.

You may represent a sub-group of a field that a larger organization views as a potential source of new members, conference attendees, or financial supporters. It may offer to house you, secure meeting space for you at its annual meeting, or provide other services that may benefit you. And it may charge very little – or even nothing – for its work.

Here are some things you may be able to provide:

- Additional credibility for the larger group;
- A new audience of potential supporters;
- Relationships with individuals or organizations that the larger group desires;
- Special appeal to prospective sponsors or exhibitors;
- Meeting attendees who can contribute to the larger group's room block;
- Meals at a meeting that can contribute to the larger group's food and beverage requirement;
- Content expertise the larger group can use for research, publications, legislative testimony, professional certification, or meeting presentation;
- An alternative venue for activities the larger group may not want to conduct on its own.

But remember, your group is very small. You need to think of ways to make it appear more potent, and allying with a more powerful group is one way to do that.

## **Operations**

You have to know how to do everything yourself. There is nobody to whom you can delegate, except volunteers who may not have the necessary expertise. Even when Board members handle day-to-day operational issues, you will be expected to know how to do the things they don't know how to do.

You will write the strategic plan (if one exists) and the marketing plan. You will create the social media plan and implement it, too. You'll arrange for videoconferencing, post web site

copy, and perform database tweaks. You'll handle publication issues, meeting planning, and shipping. And you will have to be able to take care of all the details of all of these things.

**Personnel** – You may not have any personnel authority, despite the the ED's traditional leadership role in that area. The Board may have simply hired you to handle administrative matters. If money is available to hire other people, they'll do the hiring. They'll choose an editor, lobbyist, salesperson, consultant, or whatever it is they want and that person will report to them, not to you. You should clarify your role in personnel matters before you are hired, but if they simply want a "helper," not a CEO, you are not likely to be given personnel authority. And if you ask for that authority, they may feel you are grabbing power and trying to take control of their organization.

**Finances** – Budget realistically and be patient. Financial growth is likely to occur incrementally, so don't expect sudden increases in membership, contributions, conference attendance, sponsorship, grants, or anything else. And remember that budgeting something won't make it happen. You may fall far short of lofty goals, so budget conservatively. It's better to end the day with a windfall than a shortfall.

Don't get too ambitious on the expense side, either. Don't plan big expenses because you believe those will stimulate growth. You may not be able to do everything you want right away. Hiring consultants, upgrading technology, creating a new web site, booking nicer hotels, and expanding staff size all at once may be too much, too soon.

Prepare to build a reserve and expect opposition from some Board members when you propose that. They may feel they must spend everything that is collected. They may even believe that doing so is legally required (it's not). They may feel that any money put aside for later has to

have been raised specifically for that purpose. Tell them how important it is to have a “rainy day fund” so the group can maintain operations during unexpected bad times. Make them realize that a reserve is essential for survival.

**Technology** – Identify the level of technical expertise in your group (it’s probably all over the place) and aim toward the lower end, so you won’t lose people. Seek to implement technological solutions they will understand and be able to utilize. Don’t tantalize them with high-end stuff (which you probably can’t afford, anyway).

Recommend technology that improves their ability to do something they already want to do. Don’t tout something because it’s “cutting edge,” or because “that’s the way things are done now.” Some people still brag that they don’t even know how to send an email message.

Some of your members may possess a higher level of technological literacy and want to do a lot of things their colleagues don’t. Try to find ways to appease them without dragging the whole membership beyond its level of comfort and acceptance.

**Membership** – The organization may not offer any tangible membership benefits, and many Board members won’t think that matters. They may expect people to join just “because.” Or they may want to deliver free services and information to everybody because they believe they should. Identify benefits that can be limited to members or contributors and suggest those as ways to grow your base and improve your financial situation.

**Marketing** – Some organizations boast that they don’t do any marketing at all. They claim that people just know who they are. Well, regardless how passive or aggressive your outreach, the group must have a way to tell about itself, so it will attract members, contributors, sponsors, political supporters, and anything else it wants.

So, think of marketing tactics that cost little or nothing. If you do spend money, engage in activities that are likely to generate a large return on investment.

Think small (you don't have the money to think big). And think strategically. You don't need a big budget to get attention and gain support for your group.

**Meetings and conferences** – Tell Board members how things work so they aren't caught by surprise and so they don't blame you because they think you screwed up.

They need to know that hotels don't make money from meeting room rentals, that they make it from sleeping rooms and food and beverage events, and that meeting rooms are given to organizations based on their guarantees for those items. So, if you don't need sleeping rooms, you are less valued by the hotel and there is a greater chance your event will be moved to a meeting room other than the one you inspected and reserved because the hotel needs the room you expected for a more profitable customer.

If you have a room block for your meeting, tell members to book rooms within that block, not at another hotel, in a nearby condo, or anywhere else. They have to know that the organization will be assessed a penalty if it doesn't fill its room block.

If you acquire meeting space somewhere other than in a hotel – at a university, hospital, park district facility, etc. – the host usually reserves the right to move you to another room if it needs your space for an event of its own. And it may not tell you when it decides to do that. You won't find out until event day, and the new space you are given may not meet your needs.

When producing meal events, be sure Board members know that you have to tell the hotel or restaurant the number of meals you'll need several days before the event. People who

are not in the meeting planning business don't always know that. Even those who have arranged weddings, bar mitzvahs, or family reunions may not realize that the policies they had to comply with exist for organizational events, too.

**Sponsorship** – Sponsors are often sought by volunteers who have little, if any, training in sales or sponsorship solicitation. They may not feel comfortable working on this task and would really like you to do it for them. But they may want you to do it the way they think it should be done, not the way you think it should be done.

Before proceeding, explain to them how you think sponsorship should work, but also understand that it may be conducted differently in different types of organizations.

In cause-related groups, sponsorship is considered a contribution and sponsors are individuals or companies that support the work of the organization. Benefits are often choice seating, additional tickets, special cocktail parties, and listings on donor pages.

Sponsors of mass participation events – like races, festivals, and block parties – are buying access to the organization's audiences. Event day(s) exposure is dwarfed by the group's pre-event marketing reach and the greatest benefits tend to be mailed brochures, posters, e-blasts, newspaper ads, radio spots, and web site announcements.

In medical associations, sponsors provide speakers for meal events and pay for the organization's meal expenses. Sometimes they set up their own events and only invite members of a specific group. Their goal is to convert meeting attendees to customers.

Trade association sponsors are often members of the organization, and selection is frequently governed by internal understandings of fairness, as much as it is by any other criteria.

Most organizations grant category exclusivity, so companies won't have to share a stage with direct competitors. Many create pre-packaged benefits and label the levels of involvement, calling them such things as gold, silver, or bronze. Others customize benefits to meet individual sponsors' needs, so sponsor deals are all different and each pays a different fee.

Some organizations seek reimbursement for sponsor-related expenses. Others charge a sponsorship fee that is unrelated to the actual cost of the benefit. For example, an organization may merely ask for payment of the cost of printing a sponsor logo on a tote bag. Others will charge a (higher) fee that includes the right of the company to have its logo printed on the bag.

Some sponsors seek visibility, most others want to interact with people in the marketplace. Some organizations treat sponsors as one of their constituencies and strive to deliver a satisfactory experience. Others just take their money and then ignore them. A few do not even allow sponsors to publicize their involvement with the organization.

Whatever the situation in your group, make sure everybody agrees on the definition of a sponsor before you decide what you will sell and how you will deal with those to whom you sell.

**Advocacy** – You'll have to work a bit harder on this one because many Board members don't realize what is really effective and what isn't when promoting their issues. They have to believe what you tell them, and what you tell them may not make any sense to them.

Petition drives are the least effective of all advocacy tactics, yet they are often the first ones suggested by Board members. The only real benefit of one is that it helps expand your database.

You'll have to find a way to convince them that members of Congress and state legislatures are rarely influenced by petition submissions, unless the signers are powerful people. Some local governments, like school boards and plan commissions, may be more receptive, but only if a huge number of signatures are collected, they're all from registered voters, and signers hail from all parts of the district, not just the area affected by the issue at hand.

The number of signatures collected on petitions is usually far, far fewer than the number of voters in any political jurisdiction, so elected officials are not likely to be impressed by your effort. Those folks will judge you, instead, by how much they think you can help them or hurt them at election time. What they often want is your money and they may curry favor with you if they think your group or its members have some.

And your members may be surprised when some pols boldly request (or demand) contributions.

Legislative hearings are also less effective than your members think and those who are present at these sessions may be thoroughly baffled by what they see.

Your testimony may be reported in the media and disseminated to your members, but most committee members are not listening to anything you say – and it is often obvious.

The only officials paying attention are your supporters, so they'll know what to say to help you, and your opponents, so they'll know how to knock you down. Most of their colleagues are simply present to ensure a quorum. They are checking their email, returning phone calls, or surfing the web during the hearing. They'll vote the way their party or faction wants them to vote.

But that doesn't really matter because you should know the outcome of the vote before you even speak. You should have already lobbied each one of them.

Your members have to know that you don't get votes by testifying before legislative panels or by making speeches to large groups. You get votes by talking to individual legislators or to political leaders who control the votes of others. Such things as fly-ins, media coverage, and editorial support are important components of a larger plan because they help create a more favorable climate for your direct advocacy efforts. They aren't that useful all by themselves.

Media does not operate the way your members think, either. Reporters want newsworthy stories, and that's not always what they are given. Media make money by publishing stories that attract an audience and then selling access to that audience to advertisers. So, you need to pitch stories that media will think are important, not necessarily those your group thinks are important.

**Professional development.** You'll probably have to pay for everything yourself – professional dues, registration fees, travel, even parking. If the organization can afford to pay for anything, it will probably spend it on Board members or key volunteers, so those people can acquire skills they feel will help them better manage and work for the organization. Your professional needs may be thought to be your responsibility.

## **Future Growth**

Some Board members don't want the organization to grow. They don't want staff doing everything. They don't want a lot of professional service. They worry the group will lose its special, personal flavor.

Yes, they'd like more money, more programs, a few more helping hands, maybe some technical improvements, an online community, and even an office, as long as they have keys (in a local group) and can visit anytime.

But they fret about losing control of the group and of no longer being at its center. They don't simply want to raise money or make policy decisions. They want to do the work of the organization.

They don't want the "doers" kicked out and be replaced by "thinkers" who they worry may not think correctly.

You have to show them how they can continue to be involved in a meaningful way and how the organization can grow without leaving them behind.

They have a lot of personal commitment at stake. You have to help them preserve it.

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