

**FSAE Foundation Think Tank
Seminole Hard Rock Casino & Hotel, Tampa
November 3-5, 2004**

**Theme: “Park the Pontiac, Pick the Porsche -
Who’s Got the Right Stuff for Leadership and How
Do We Get Them In the Driver’s Seat?”**

At first blush, associations appear to be very much alike. In some core areas, they are. They have members who pay dues; those members have in common an industry or an interest in a specific passion; they depend on dues and non-dues revenue; they have a staff and a board; they depend on the association to handle specific needs. The cookie cutter crumbles at closer inspection. Some depend heavily on solid, savvy staff leadership to survive and prosper. Some are driven by strong board members who use the association executive as a manager to suit their needs. Some are very large and serve their members through trade shows, magazines, conferences and events. Many are much smaller and focus on a few primary needs of the members. Many are technologically savvy and serve as a bellwether for their members. And others have communication challenges because their members do not read newsletters or emails. And so it goes.

You get the point. The association executives who participated in the 2004 Think Tank may have come to the session hoping to get answers to their leadership questions. We sought to decipher the code of how to identify, attract, nurture and sustain the “Porsches” of top quality leadership – board chairs, staff execs and corporate member volunteers. We want to be able to shop for first rate, responsive, savvy leadership models with all the bells and whistles that could help us get the job done. It’s clear that associations can’t drive on the Information Superhighway in their father’s Oldsmobile. External factors– the economy, natural disasters, national security, international trade, labor laws – can drive major changes in the way we do business. We wanted to know: *How can we be proactive in securing the high performance leadership that will be needed at all levels?*

“Discovery follow discovery; each both raising and answering questions; each ending a long search, and each providing the new instruments for a new search.” – J. Robert Oppenheimer

This think tank process offered parallel tracks of value:

- 1) Together, we identified, discussed, reasoned and sought to understand what we need to start doing now to help our organizations secure the quality leadership necessary for progress and success in a changing world. We talked about three types of leadership: chairman of the board, staff president/executive director, and corporate board members.
- 2) The process also offered long lasting value for participants as they learned to tap into innovative methods for stimulating their creative thinking, thus being able to tap into new resources for problem solving. Our first creative thinking exercise was to experience each of the five senses to awaken all parts of our brains. Then we counted backwards from 50 by 3’s.

Our facilitator was Judy Gray, President & CEO of Capital Management Consulting in Tallahassee.

“The significant problems we have cannot be solved at the same level of thinking with which we created them.”
- Albert Einstein

We posed many questions to expand the parameters for discussion. After two days of animated discussion, information sharing, anecdotal stories of personal experiences, creative exercises, guest speakers, summaries of related outside resources, and independent thinking, what we emerged with were more ideas than answers. It became quickly obvious that one size would not fit all. Armed with strategies and information that could be transferable to their specific situations, the executives were fortified with tools that could be scaled up or down for their association's needs. The peer to peer sharing of challenges and successes was especially beneficial.

“I can’t understand why people are so frightened of new ideas. I’m frightened of the old ones.”– John Cage

Gearing Up for Providing Value in a New World – The Future of Associations

“The art of progress is to preserve order amid change and to preserve change amid order.” - Alfred North Whitehead

Here are background questions about the future of associations that we considered before we got to the questions about what kinds of new leaders would be needed:

What factors will impact the success of associations in the next 20 years?

What will our organizations “look like” in 20 years? How will they be different from what they are today? What will remain the same? If we built an ideal one from scratch, what would we keep? What would we leave out?

How will our members be different? How will their needs have changed? What will they need from us? How will we have to change to give that assistance to them? How can we set their expectations to match our capabilities? What will they be able to get from us that they cannot get elsewhere?

How will business and industry and government have changed? What were the factors driving those changes? How do their changes affect us?

Resources

Our efforts to gain a deeper understanding of all of our topics were complemented by select think tank participants summarizing and discussing relevant ASAE articles. The articles are free and available on www.asaenet.com or by contacting Beverly Elliott at Beverly@fsae.org.

Here are the articles we used to learn more about what associations would look like and need to offer in the future:

- ❑ “Next Generation Professional Development Through Technology” by Soren Kaplan, Ph.D., & Julia Lynn Ashley.
- ❑ “Are Your IT and Strategic Plans Aligned?” by Dwight Bullock & Joanne Rang
- ❑ “Imagine: Envisioning the Virtual Association” by Jeff De Cagna.
- ❑ “Are Virtual Associations a Reality?” by Jeanne L. Allert.
- ❑ “A Case Study in Virtual Volunteerism” by Karen Krzmarzick.

Creative thinking exercise: Think of your organization as a car in the year 2015. Describe the features you would want it to have, inside and out.

“The best way to have a good idea is to have lots of ideas.”– Linus Pauling

What we learned about preparing to lead the association of the future:

We must prepare for change. It’s coming whether we are ready or not.

- Benjamin Franklin once said, "Time is money." In today's busy society, business and personal time continue to meld. Nonprofit staffs that rely heavily on volunteers face a tough challenge — convincing individuals to give up free time to volunteer.
- Not long ago, when techno-prophets began musing about where information technology and the Internet would take us, we began to hear about the "virtual association," the "wired organization," and "the association without walls." This organizational concept appeared in trade journals, conference brochures, and strategic planning sessions everywhere. We need to learn more about our options.

New tools to consider and research further

- Member education and professional development are core services of most associations. And they should be — developing current and future leaders is an invaluable service that associations are well positioned to provide. But new technologies are paving the way for approaches that may disrupt the business-as-usual approach. We need to learn more about and embrace new models that elevate the impact of existing programs, increase member satisfaction, and create new revenue models in the process. They are using new technologies, such as Webinar software, webX, ReadyTalk, and KRM to host virtual town halls, online conferences and workshops. Experts recommend that associations use professional organizations, like Freephone.com, to help them the first time.
- We have to use many different methods (face-to-face, electronic, etc.) to reach and teach the members.
- Get a Blackberry! It works when cell phones and electricity don't!
- Investigate other new technologies that are available for online meetings.
- Resources to check out: volunteermatch.com; verticalnet.com; sla.org

Strategies for securing and integrating technology

- Benefits of using new technologies include being an additional non-dues revenue source and the ability to reach more members (especially younger ones) because participants don't have to factor in the time and expense of travel.
- We should strive for a balance of keeping technology in front of membership yet not get so far ahead of our members that we lose them. Our job is to foster change, to be one standard deviation ahead of the curve, and to be a cheerleader for its benefits. It’s easier to integrate a new technology when old methods are no longer working. We need for our boards to support our getting the tools we need to do our jobs.

- Self-paced options are particularly good when used for required continuing education; it appears that if that is not a necessity, people prefer to come together for the networking and social opportunities.
- With the importance that technology plays in helping organizations meet their objectives, it makes sense for the information technology (IT) plan and the overall strategic plan to be in alignment. But in many organizations, that's not the case. And the cost for this disarray is lost productivity, scattered work, and duplicated efforts.
- Most of us had not linked our strategic plans and technology plans. We know we need to have an executive summary of those plans and we need to assure they are reviewed frequently. We know it is easier to get technology funded if it is included in the strategic plan.
- Don't jump in with both feet. Outsource technology needs to control costs and have access to the most current equipment and products. We need to recognize our limitations and hire experts to help us.
- We need to understand our ISP's general capability, emergency capability, and the type of equipment they use to serve us.

“But creators not only can imagine or envision, they also have the ability to bring what they imagine into reality. Once a creation exists, an evolutionary process can take place. Each past creation builds a foundation for the next creation.” – Robert Fritz

The Chairman Conundrum

“If I have seen future it is by standing on the shoulders of giants.”– Sir Issac Newton

We all know the routine. The Nominating committee meeting is coming up. We're looking for a chairman who has integrity, charisma, clout, leadership skills, the respect of the community, access to financial and human resources, and an altruistic streak that drives him or her to volunteer. We'd like very much to have a creative, energetic, innovative thinker who can bring new ideas and strategies to our organization.

The problem? Executives like that don't have much time to devote to an organization; they are out of town a lot; and they are accustomed to delegating the types of things you really need for THEM to do. *How do we approach an ideal candidate with a winning proposition and assure that person doesn't lose interest or stamina half way through their term?* And another very real problem is that many seasoned executives who have risen to power and authority over a few decades are not necessarily the ones who can provide a dynamic and new leadership style to our table. *How can that be overcome?*

Also: How can new expectations of the Chair's and board members' roles and responsibilities be redefined (and accepted by them) to meet the needs of our organizations? How much innovation and “leadership” do we really want from board members?

Resource

Guest speaker Thom Stork, President & CEO of the Florida Aquarium in Tampa, and Incoming Chairman for Visit Florida.

Stork spoke from two points of view – as an executive who has a board and as a chairman who will soon be leading a board. He advised us to be upfront with potential chairmen. Let them know

what will be expected of them; don't use bait and switch. Ideally, there should be some competition for the job of chairman. The staff should advise the nominating committee of what the organization needs. Stork's organization uses a Board Development Group – members who are not on the Executive Committee – to spot and assess talent. He acknowledged that it's difficult to identify upcoming chairman and keep them viable since so many get promoted and transferred. Stork is hands on in selecting and grooming his chairmen.

Our conclusions about working with the chairman of the board and the board:

- This topic matters because we need the best and brightest leaders.
- We may have to reset expectations to remind board members that the board's job is making policy, not managing the organization.
- We must build the board's capacity for high impact governance. Use the strategic innovation portfolio process technique (detailed in ASAE's "Proactive" article) to produce significant, planned innovation in response to strategic issues, opportunities and threats, relevant to your association's mission and vision.
- Board training is different from board orientation.
- We need to court and nurture our boards so they will be passionate about the organization and our issues; be on good terms with the staff and executive; be interested in doing the right thing rather than the same thing; be committed to being advisors, not adversaries.
- The bylaws should be a fluid document, changed when it gets in the way of growth, efficiency or carefully considered innovation. Setting them in stone sets the organization in stone.
- We need to be thoughtful about what the board needs. An objective method is to create a formal self-evaluation. After the data is returned, discuss and analyze it in terms of a competency assessment. What skills are needed in a chairman? Identify them, solicit those candidates, and provide suggestions to the nominating committee.
- The staff executive should be a proactive agent for change. The board should allow the staff executive to take risks without fear of losing the job.
- We need to drop any "victim" mantle that cloaks and chokes our inability to be accepted as a leader instead of a manager. Look for a job that is a better fit if you are frustrated in the present one.
- We need to understand why someone wants to be the chairman of our organization. We need to figure out how to appropriately give back to that person during their year without having their agenda overshadow the organization's needs.
- There's no substitute for a great relationship between the staff exec and the chairman.

Creative Thinking Exercise:

The Ideal Chairman – A Fairy Tale? We want him/her to be:

Like Goldilocks – not too much involvement, not too little, just right.

Like Snow White – no SEC investigations, bankruptcies or indictments.

Like Three Little Pigs – keeps the wolves from our door.

Like Hansel & Gretel – will work for crumbs.

Like Cinderella – does not turn into a pumpkin in a crisis.

Like Prince Charming – the staff, media, and Governor love him/her.

Like Peter Pan – could fly if that's what it takes.

Like Alice in Wonderland – sees a way out of a hole.

Like Pied Piper – the board would follow him/her anywhere.

Like Rumpelstiltskin – can spin gold out of straw.

Like Three Blind (Deaf/Dumb) Mice – hears no evil, sees no evil, speaks no evil of the staff exec!

“Boss your boss just as soon as you can; try it on early. There is nothing he will like so well if he is the right kind of boss.” – Andrew Carnegie

Room for both? The Traditional Staff Exec and the New Leader

“Organizations learn only through individuals who learn.” – Peter Senge

Those presently serving in this role know they must grow in the job. They must stay informed about how their members and the economy are changing. They must exhibit vision and managerial courage to do what must be done to help the association evolve.

How does the traditional staff exec become a New Leader? How can people quickly learn new skills? How is that knowledge developed and shared within an organization? How do they help an organization reinvent itself in the midst of the already demanding daily pressures of meeting member needs? How do they find the time for professional self-development? How can they get objective, constructive feedback that will identify areas for improvement? How can FSAE’s present professional development offerings be re-engineered to add even more value? What partnerships might be valuable that could benefit association executives in their quest to stay on the cutting edge? How can we benefit from best practices of other like organizations in other areas?

Looking to hire a new staff executive? How would you want this new leader to be different from the one that is in place now? What qualities and skills are ideal? Necessary? How do you determine if a candidate is really good or just presents well?

Where do you look? Should they have some business experience? Should they come from the field that your members are in? What pros and cons does diversity bring to the opportunity? How do you prepare for the best outcome if you hire someone controversial who appears to be able to fit the bill? If they are young, many times they are untested and inexperienced. If they are seasoned professionals, you may not be able to afford them.

What perks does the new leader want? What kind of environment and challenges will attract them to your organization and keep them interested in turning down a headhunter? Is your association ready for a new kind of leader?

Resources: Guest speaker Lorraine Lavet, Senior Client Partner, National Trade Association Practice Leader, Korn/Ferry, Washington, DC.

As a headhunter for association CEO jobs, Lavet offered insight into the characteristics Korn/Ferry looks for in selecting new leadership. She sees a sea change in association jobs at the national level; many positions will be available soon. Incentive packages are changing. Chemistry is the tipping factor for selecting new presidents of associations. The search committee will be asking themselves if the candidate is someone they can successfully work with. Skills needed for new association execs: solid business acumen; strong manager of budgets and staff; vision of where you are going to take the organization in five years; be able to demonstrate value to members, to foster membership growth and steady revenue streams; and outstanding oral and written communication skills. An MBA is more valuable than a CAE. A search firm is looking for candidates that will stay in the job for at least 10 years.

Lavet advised us to gain a better understanding about the competition we face for mind share of our members and our leaders. CEO members are going through downsizing. They have less time for not for profits. We need to pair our empathy with realistic expectations.

Sarbannes Oxley affects associations as well as businesses. Your board will be looking to adopt many of the same principles that apply to businesses. Be familiar with what their expectations are. Much more auditing will be requested.

“Opportunity, for most of us, doesn’t knock just once; she wraps a continual tattoo on our doors. The pity is that much of the time we’re either too preoccupied to hear or too lethargic to answer.” – Benjamin F. Fairless

ASAE articles:

- ❑ “The Leadership Traits of the Geeks and Geezers” by Kristin Merriman-Clarke
- ❑ “Changing of the Guard” by Michael Richman
- ❑ “Guiding Innovation” by Jeff De Cagna

Creative Thinking Exercises: List seven things you could learn from your dog about leading your organization. Write five imaginary headlines about your organization that you would most like to see in tomorrow’s newspaper.

“In order to burn out, a person needs to have been on fire at one time.” – Ayala Pines

What we learned about being a value-added, relevant, dynamic staff leader:

- All leaders need an adaptive capacity to seek and absorb new data and make changes accordingly. They see the need to engage others for shared gain. They see themselves as a leader. They have a distinctive voice that combines authenticity and integrity.
- Leadership is about action, not title. Associations may not survive but they will definitely die if they play it safe.
- Sometimes new batteries in an old abacus works! All of us can change.
- Even though not for profits are service organizations, they should be run like a business. You have to stay alive to be able to serve your members. It does help to have had business experience.
- It’s up to us to help others to see our value (our certifications, awards, association experience, etc.). We cannot be the victims of a misguided board unless we allow it.
- Changing people does not always solve the problem; changing attitudes might.
- The success of transitioning from one exec to the next is influenced by: why the previous exec left; what “golden parachute” that exec received and how that impacts the new exec; where the organization is in its life cycle; if an internal candidate was not hired; the culture of the organization; the buy in from the staff of the search committee’s choice.
- When the staff exec sets organizational objectives for the board to review, put the outcomes in terms of “if we are successful, this is what it will look like.”
- Perform an annual Return on Investment survey of all programs and events which require staff time and expense. Determine whether to drop, keep or tweak them. Exhibit managerial courage to do the right thing even if it’s unpopular.
- Step back and reflect to get the big picture. Don’t just do something; sit there (and think)!

“Whatever the reasons, we do not pursue emotional development with the same intensity with which we pursue physical and intellectual development. This is all the more unfortunate because full emotional development offers the greatest degree of leverage in attaining our full potential.” – Bill O’Brien

The Ideal Corporate Member – It’s All About Give and Take

“You have not done enough, you have never done enough, so long as it is still possible that you have something to contribute.” – Dag Hammarskjold

We agreed that most of the time we need the board members more than they need us. We need their financial support for dues and sponsorships. We need their involvement as volunteers to serve on committees, help us lobby and to recruit other members. We need access to their corporate resources to give us pro bono help with extraordinary needs, like printing brochures, helping with development of a marketing strategy or for one of their executives to be a speaker or panel member. And we usually go to the same folks who have helped us in the past. *What can we do to change this equation? How can we offer at least as much value in return to their specific company? What can we do for them that will really matter?*

Participating in the community used to be on the performance objectives for employees in larger companies. They looked to organizations to provide the opportunity for leadership development for managers. They knew that the time an employee spent networking could bring a tangible return on investment for their bottom line. For the most part, those days are over. Global competition has forced even the company with an outstanding corporate conscience to assure that employees who volunteer on company time will bring in business that will positively affect the bottom line.

The successful types of business manager or executive that we want participating in our organization are suffering already from time poverty and may likely be transferred out of town next week. The person they offer as their representative many times is a front line sales manager who may not have the necessary decision making authority to help our organization first hand or may not have the skills or interest necessary for communicating the value of our organization back to those who make decisions about membership or sponsorships. *How can we recruit the most desirable representatives from our member companies? How can we make it easy for them to share the value of our associations with top management? How can associations revamp their needs and expectations of members to change with the present realities that volunteers face? How can our organizations offer something compelling of value that would withstand these conditions?*

“There can be no acting or doing of any kind, till it be recognized that there is a thing to be done; the thing once recognized, doing in a thousand shapes becomes possible”.
- Thomas Carlyle

Resource: Guest speaker Wayne Atherholt, Vice President of Marketing and Retail Enterprises for the Museum of Science and Industry (MOSI) in Tampa.

Atherholt spoke from the point of view of how they cultivated and solicited board members who would bring value to MOSI. He says it’s important to control access of the staff to the board and chairman. He states that it’s important for not for profits to write a “thank you” note to sponsors and donors. Using our theme of the car, Wayne gave an analogy about how we should “look under the hood” when looking for board members. We spend a lot of time shopping for items that are a whole lot less important than the board members we select. He suggests that we look for someone from outside your industry if they would add specific value to our boards, like political access, significant time to serve as a volunteer; money; legal or marketing expertise. He urged us to “be a sleuth and a snoop; be a detective” to assure we are getting the best possible board members.

ASAE article: “Proactive” by Doug Eadie

Creative Thinking Exercise: You just got a new board member and you’re informally asking around about her. What would you want the good news to be and what would you NOT want the bad news to be?

Here’s what we learned about seeking and keeping the ideal corporate member:

- Using the analogy of an association as an airplane, the pilot and team are the staff; members get on because they know where you are going and want to go there too.
- We should "shop" for board members who will bring the most value to the organization.
- We don’t want “professional board sitters.” If you’ve been given a bad match, consider asking that disinterested board member for help in getting a new representative from their company.
- We should think of the board members as "assets."
- We should reward board members in creative yet appropriate ways: get their picture in the papers; thank them publicly and in print for their contributions, introduce them to potentially desirable business partners or influential community leaders.
- Small thoughtful things can be used to reward board members: access to information; invitations to special events; getting to choose the meeting location or a speaker for a meeting; a handwritten “Thank you” note.
- Companies want to see a return for allowing employees to serve on boards.
- We must be clear about our needs and expectations when we get a new board member.
- An orientation is important to help them understand the needs of the organization. Remember that training is different from an orientation.
- Diversity is desirable, especially when it works. Analyze the profile of your board to assure it reflects your membership.
- Appealing to young professionals (the E-Generation) to be on the board can be a challenge. They want things to be quick, accessible, and funny. They think stodgy organizations are unreceptive to inventive ideas. They bristle at hierarchies and prefer episodic volunteering rather than long-term commitments. They don’t have the time or the patience for monthly meetings. Be flexible in meeting their needs and exceeding their expectations.

From Great Minds Comes Great Insight

“A problem well-defined is half-solved.” – John Dewey

In our dynamic and highly interactive learning environment, Think Tank participants identified, for three key levels of association leadership, the characteristics of successful leaders who thrive in a challenging and changing environment, and how to recognize, recruit, nurture and reward these new leaders. Much of our discussion affirmed that the innovations that many of the FSAE association executives were implementing were right on target. We hope that the glimpse of what’s coming and what’s possible will serve as a catalyst for courage for those who face challenges in implementing their vision for the future leaders of their association.

“Creative thinking may mean simply the realization that there is no particular virtue in doing things the way they have always been done.” – Rudolf Flesch

#####

Facilitator of the 2004 FSAE Foundation Think Tank and author of this white paper is Judy Gray, President & CEO of Capital Management Consulting in Tallahassee. She can be reached at 850-385-7686.