

HIT THE GROUND RUNNING

The President's First 100 Days



Playbook for Success
Building a Team
Utilizing the Resources
Advancing the Mission

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RobertCHarris,CAE

\$20



A must read for
your first
100 days!

Hit the Ground Running - The President's First 100 Days

A step-by-step guide for
incoming presidents

By Bob Harris, CAE and Bill Pawlucy, MPA, CAE

Bob Harris: Bob@RCHCAE.com, Bill Pawlucy: Bill.Pawlucy@Investools.com

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Foreword

You are the incoming president. Hopefully we caught you in time. The time to start planning is at least sixty days before your installation. There's a lot to be done --- from planning to appointments, this guide intends to be of help.

Hit the Ground Running – What Does it Mean?

- To begin a venture with great energy, involvement, and competence.
- To immediately work very hard and successfully at a new activity. “If elected, they promise to hit the ground running in their first few weeks of office.”
- To be ready to work immediately on a new activity. “His previous experience will allow him to hit the ground running when he takes office in the chamber, association or society.”

Traction or Slippage

The intent is to give you enough information that you'll start the year with traction. Your plans, aims and ideas will be solidly planted on the ground and others will quickly notice you as a president who intends to advance the organization.

The opposite is slippage. If you put it off, you'll try to prepare after the installation in your first or second month. You might inform others that you didn't have time for the first meeting, you'll make committee appointments in a month or so, you have no clear plan of work, etc. Well, if you meet quarterly, you've slipped behind by three months.

We designed this guide to provide you with traction at the start of your term and plenty of momentum to last the year.

Why 100 Days?

It will take about 100 days to set your course for a successful presidential term. Hopefully, your first 100 days will include about two months before you take office (60 days of preparation and study) and the first 40 days of office (your initial board meeting.)

By identifying it as just 100 days, it's manageable. Others will see what you anticipate and join force with you. Use 100 days as your first benchmark for achievements. After all, in most cases, a presidential term is just 365 days.

Feedback Welcome

The authors want to hear about your successes and challenges. Were there surprises you did not anticipate? Did you have a great term as president? What would you suggest to presidents who follow you?

Bob Harris, CAE, can be contacted by e-mail at bob@rchcae.com.

Bill Pawlucy, CAE, MPA, can be reached by e-mail at Bill.Pawlucy@investools.com

About the Booklet – Hit the Ground Running

It is our belief that part of the greatness of North America is the success of nonprofit organizations. To promote and continue their success, we want to see you be successful in your presidency. The booklet can be shared, copied and adapted to help other incoming presidents. The only thing we ask is proper credit and attribution.

The Tips

The authors have many years of seeing the best and worst of associations, chambers and other nonprofits. To illustrate many of the chapters, tips are included.

The Appendix

By providing templates and samples in the appendix, as president you can immediately apply some of the ideas. You'll find more examples at the website of Bob Harris at www.nonprofitcenter.com.

Format

The booklet is divided into four sections to help you understand and organize the year. They include:

- People – The team you call upon to ensure a successful presidency.
- Communications – The image and messages you convey as the president.
- Planning – Your preparations to achieve your goals and advance the organization.
- Resources and Structure – The organization's resources and structure to allow you to succeed.

About the Authors

Bob Harris visits with nearly 4,000 associations, chambers and charities annually. His career started in Washington, DC with Presidential Classroom. Later he built an association management company in Tallahassee, Florida.

He is on the faculty for the US Chamber of Commerce. He has authored several books on association management. To evaluate organizations he created the Association Self-Auditing Process, which has been used by 10,000 organizations. He has worked with King Abdullah's Center for Excellence in Amman, Jordan to assist business associations in 2006.

He has worked for Hyatt Hotels of Florida for nearly 25 years. His website has hundreds of pages of FREE management tips and templates that he will reference today. (www.nonprofitcenter.com). You can e-mail Bob at Bob@RCHCAE.com.

Bill Pawlucy has spent over 20 years in the customer service field in both the for-profit and nonprofit arenas. With more than 14 years of experience in the nonprofit world where he has served as a volunteer leader, led several nonprofits and sat in on many board meetings, Bill brings a wealth of knowledge to nonprofit executives. As Head of Association Relationships for Investools, Inc., Bill has overall responsibility for bringing quality investor education and strategic partnerships to associations.

Bill has served as President on the executive committee of the Delaware Valley Society of Association Executives (DVSAE). He also served as a director on the board of the New Jersey Society of Association Executives (NJSAE). Bill has been involved in customer service training for the past ten years in markets domestically and abroad. In his previous position, he served as manager of operations, Poland for Blockbuster Video International. He was involved in the start-up operations for the Taiwan and Poland headquarters.

An honors graduate of Seton Hall University, Bill holds a master's in public administration, with a concentration in non-profit organization management. He holds a bachelor's degree in international business and finance from Temple University and has earned the designation of Certified Association Executive (CAE) from the American Society of Association Executives. Bill is also a recent graduate of the U.S. Chamber of Commerce University of Delaware Institute for Organizational Management, which is aimed specifically at the education of non-profit executives. He is also on the faculty for the US Chamber of Commerce and serves on the CAE Commission. You can e-mail Bill at Bill.Pawlucy@investools.com.

People: Volunteers and Staff = Team

Gather your Team

Similar to a change in a political administration, one of the first things to do is gather your team. The year ahead will go by quick, with many unexpected twists and turns. You will want to rely on a team of volunteers, experts, staff, etc. who support your aims and term of leadership.

For example, while you may have an interest in an overly successful conference or new legislation, you probably don't personally have the expertise in every area. Or, other areas you'll need help might be more uncomfortable, such as a poorly performing chapter or a member grievance.

You should not try to handle every situation on your own. Use your team to help in areas in which they have expertise and experience. You'll not only be a stronger president but will be facilitating leadership opportunities for others.



TIP: Read the chapter in *Good to Great* about “Who’s on the Bus?” Not only do you want to surround yourself with the best team, but you may have to be brutally honest about asking some people to leave the team. The start of your term is the time to evaluate and align needs and people.



TIP: Turn to the immediate past president for counsel (or current president if you're doing your preparations in advance of your term.). Share your ideas and find out what he or she thinks and advises. Similarly, hold a discussion with the chief paid executive¹. Both have experience in governance and management that can get you off to a great start.

Conduct an Orientation

Don't neglect board orientation because you think the board of directors heard it all last year. An orientation is a great opportunity to communicate goals, achieve buy-in, and develop strategies. It also delineates the distinction in the roles of the board and staff.

Since it is not a formal meeting setting, it allows for open discussions amongst board and staff. Thus, not only imparting knowledge but also provide time for getting to know each other and exchanging ideas.

¹ The phrase “chief paid executive” is synonymous with executive director.

Many presidents use this time to “float” their ideas for board buy-in. Receiving enthusiastic support is encouragement to advance on your plan of action. If support is luke-warm, you’ll have time after orientation to explore alternatives for advancing the mission and goals.

The orientation is the time and place to carefully review the board book or leadership manual. Make sure that everyone understands the organization’s mission statement.



TIP: Need help in planning orientation? Turn to staff who has experience in this area. Also consider some guest speakers at your orientation, such as an industry guru to talk about trends, an attorney to talk about protocol, and/or a CPA to discuss finances. You don’t have to plan and conduct the orientation alone.

Inventory Committees

Committees are an essential work force in the organization. The bylaws will identify the committees, the appointment process and the president’s authority related to committees.

Start by inventorying the existing standing and ad hoc committees. Identify what exists and then honestly consider how committees will work during your term. The bylaws may give you (or the full board) the authority to appoint and dissolve committees, to clarify their charges, and to align their work with your goals. Committees will require significant time and attention.

The goal of a committee is to do work on behalf of the board and to bring a solution forward through the committee. Committees also serve as a proving ground for potential new leaders.



TIP: Consider whether or not volunteer service on a committee is pleasant, rewarding experience, or one that leads to frustration and disappointment. .

Remember that committees work for the board and do not have a life of their own. Unless specially charged or authorized, committees don’t have the power to speak for the organization, to contract on its behalf, or to spend funds. If you hear a committee chair sit down with his or her committee and say, “So, what do you guys want to do this year,” then you know they have not fully comprehended the purpose statement and current year work charge.

In general, the adage for committees is, “Committees Recommend, the Board Reviews and Approves, and Staff/Volunteers Implement.” You want to be careful that committee work does not take up valuable board time.

Thus, you want to consider if you want more or fewer committees? Does each committee have a clear purpose statement so that all participants understand exactly what is expected?

There is a trend to reduce committees to just the essential. Often an organization aligns their standing committees with the major goals in the strategic plan. Or keeps only the necessary committees, such as finances, audit and nominations.

After all, committees require board and staff time, so if they don't have a clear purpose of existence, maybe you want to combine some committee or rely more on task forces to accomplish short, focused projects



immediate.

TIP: Ad hoc committees and task forces are appointed for short-term projects. In today's busy environment, many volunteers are willing to serve on a task force to get the job done and disband, as opposed to a year-round standing committee. This provides a volunteer the opportunity to serve but not make a long-term commitment; the gratification is usually more

Appoint Committee Chairs

You'll have to decide if you want to keep the existing chairs or appoint new ones. Have you identified the right people to advance your aims through the committee process? Are they willing to serve?

By appointing a vice chair, you'll have a system of back up in case the chair is unable to complete his or her term. Some organizations appoint committee co-chairs for this purpose.



TIP: You might ask your incoming vice president to appoint the vice chairs of the committee as a way to maintain a smooth transition. Thus, as your term comes to an end and the incoming president takes over, the vice chairs will be part of the incoming team.

Build Staff Relations

The staff has the institutional knowledge for the organization --- meaning that while the volunteer leadership may transition each year, the staff generally remains consistent. They have a vested interest in managing the organization with excellence.

As president, you'll bring in new ideas and hopes to the organization, while the staff focuses on administration and management requirements. It will require your good governance balanced with the staff's management expertise, to ensure a great presidency.

From the start, recognize the distinction in board – staff roles. Nearly every board has a director who slips into feeling it is his or her duty to manage the office and staff duties. This is called “micromanagement” and should be discouraged by the president.

In general, the board has four broad responsibilities:

- Governance of the Organization/Corporation
- Policy and Position Development
- Strategic Direction and Vision
- Fiduciary Oversight²



TIP: Take time to break bread with the staff. It is possible that you will serve an entire year and never have the chance to meet the staff in a relaxed setting --- such as lunch. Make it a priority to get to know the staff. You’ll be amazed how hard staff work when they know you personally.

People Performance

In your role as president, along with the board, have a responsibility to evaluate the performance of the chief paid executive. The process can go awry if it is not done according to policy and processes.

For example, do you appoint a committee to measure CEO performance? Generally, it’s not a responsibility of the *entire* board, but that often depends on size of the board. More importantly is ensuring that there are written job descriptions and objectives against which you can measure. Finally, find a measurement template that covers the unique aspects of non-profit management skills.

² A person or board legally appointed and authorized to hold assets in trust for another person. The board oversees the resources on behalf of the members of the organization.



TIP: When it comes to the performance of staff, that is a responsibility of the chief paid executive and not the board of directors. The president may have to explain to board members that the relationship between CEO and staff is not one in which the board should interfere without good reason.

In contrast to measuring the CEO's performance, there is opportunity to improve the board of directors by conducting an evaluation. There are guides available to query and improve the board's effectiveness. The questions tend to center on understanding the mission, access to adequate information, format of meetings, relevance of discussions for advancing the strategic plan, etc.



TIP: Conducting a performance review of the board is a responsibility of the president or a task force. It should not be perceived as an initiative by the CEO (for political reasons.)

Develop a Ladder of New Leaders

While the focus is on you as incoming president, you'll want to change the focus to be on those who will follow you. Assess whether or not the organization has a good leadership succession ladder. Are there plenty of volunteers waiting in the wings to follow your presidency?

Make leadership identification and recruitment a priority for increasing volunteer resources.



TIP: From time to time, ask your president elect or vice president to step in for you. Maybe you need to miss a meeting and allow him or her to learn to chair a meeting. Or you can call for the incoming president's help in doing interviews. You want to provide opportunities for those behind you to be comfortable in the chief elected position.

Your focus on enhancing leadership opportunities and developing new leaders will be one of the most long-lasting benefits of your term. The adverse is a president who doesn't think about success, and the administration following yours is characterized as being short on volunteers and ready-leaders.



TIP: Stretch for potential leaders. Break out of the tradition of just looking at the leadership succession ladder for workers. Turn to members at-large, committee participants, thought leaders and young leaders to ask them to be on your "team." You may create non-official roles for volunteers; not every leader has to be a member of the board of directors.

Looking Inward

There are many unique traits that make up a great leader. No two leaders are the same. Though some traits might be common to leaders in nonprofit organizations:

Steward – See yourself as a steward of the organization; nobody owns it. You are simply the person selected and elected to advance its mission and goals.

Facilitator – You have an opportunity to make things happen. You are now positioned to facilitate greatness.

Ethical – You promote the highest standards and ethics so that people never question you and turn to you for counsel.

Consensus Builder – Without being heavy handed, you offer good ideas and seek to build consensus to see their fruition.

Thought Leader – You're in a position, that with resources, ideas and research, you are considered a thought leader to who people respect and turn to.

Good Delegator – You know you achieve more by asking for help, delegating projects and sharing the limelight, than trying to do it all yourself.

Friend – You intend to leave your presidency with new friends and to maintain the important relations with whom you started your term. Leadership is not about making friends, but you want to be positioned to be a friend to the many lives you will have an opportunity to touch.

Enthusiastic – You've heard, enthusiasm is contagious. Your enthusiasm will influence others to work for the organization.



TIP: Take an inventory of your leadership traits and style. Start your term with strong characteristics that people will respect. In your presidential role, you'll have the chance to develop new traits that will stay with you a lifetime. Be true to yourself.

Communications

Create a Healthy Environment

One job of the president is to ensure there is an environment that promotes respect and encourages open dialog among volunteers and staff. Make it your commitment to promote open communications.

Regarding communications, inform others as to your communications preferences and style. If you prefer written reports, tell your colleagues and hold them accountable. Maybe you desire a staff conference call every other week. Or, e-mail and attachments fits your needs best to monitor progress in the organization during your term.

You want to set the tone for meetings that are transparent and open. Members and others don't like to think that you are holding secret meetings in which they have no right to access. After all, most dues paying members can be considered your stakeholders.

Make it a practice to encourage and facilitate open and fair dialogs. The president does not dominate the discussion but rather guides it to ensure that all perspectives are considered at the right time and place. You want people to leave meetings with a positive attitude --- motivated to help the organization.



TIP: One of your board members has a personal agenda that is counter to the organization's mission and values. What do you do? If you create an environment of open discussion of the issues then everyone should disclose any problems, solutions and conflicts they may have. Use the first board meeting to set the stage, disclose any potential conflicts of interest and to determine the best strategies to work with your board.

Two Ears and One Mouth

You've heard it before; we have two ears and one mouth for a reason --- to encourage us to listen twice as much as we talk.

Opinions count, even if they are counter to what you believe should be the proper course of action. There are many reasons the leadership is made up of diverse individuals, representing a cross-section of the organization's constituency. Good listening skills and a willingness to encourage healthy, open dialog will produce better outcomes.



TIP: Wisdom comes not from speaking too much but from constantly listening and monitoring. A true leader knows how to hear the unheard. Reading body language is equally important as listening to words.

In a publication by the Harvard Business Review, the Parables of Leadership details the five elements of leadership and how to lead not superficially but with great depth and wisdom.

One of the parables; “The Sound of the Forest,” speaks of a prince who is soon to take over for his father as king of his land. The father enlists the aid of a great master to teach the prince the basics of being a good leader. The great master tells the boy to go to the forest and listen intently to every sound. When the prince returned, he spoke of how he heard birds singing, the crickets chirping and other sounds that could be heard by the human ear. The great master told him to go back and listen more.

The prince was perplexed but did as the great master said. He sat for days on end and listened. When he returned he told the great master that he heard the sun shining, the flowers opening, the grass drinking the morning dew and other sounds unheard. Through the great master’s tutelage he learned to hear the unheard and lead intuitively and look beyond the surface of an issue or problem.

As the president, listen carefully to your board and staff. The ability to notice and translate the meaning of actions and words is truly a gift and one that will break down barriers and make the work of the board and staff rewarding.

“If you listen to the whispers you will not have to hear the screams.”

Manage your Message

As you write that first president’s message, or address members at the annual meeting, you want to communicate a consistent message at the start of your term, throughout the term, and as you wrap up your term.

For example, is your emphasis on legislative participation and political victories? Or maybe you want to focus on membership growth, satisfaction and retention. Or, maybe you have a goal of fund raising to relocate to a new office building.

The point is to be clear at the start of your term what your message will be, and deliver newsletter articles, agenda and achievements that clearly support your original message.

Members respect the president who says what he or she is going to do, sets out to do it and wraps up the year by saying, “We did what we said we’d do for you.”



TIP: The organization's website is a good way to publish a clear message of the board with you as the president taking responsibility for achieving that vision. Continuously update the progress both on the website and when speaking with the constituency of the organization. Be remembered both for your words and by their results.

Mission Statement

The most important description of the organization should be described in the official mission statement. The mission should identify the organization, which it represents and what it offers. For example: "XYZ association is the premier representative for ABC professionals, promoting excellence through education, advocacy and ethics."

Contemporary mission statements are memorable, short and distinguishable from other organizations. The time to update a mission statement is usually at the strategic planning retreat.



TIP: Can't find the mission statement? Check IRS Form 990 that requires submission annually of the organizations "Statement of Purpose."

Emphasis on Ethics

There is more scrutiny on nonprofit organizations and their boards than ever before. Part of it results from the corporate scandals and failures of multinational businesses.

More recently, the IRS and Congress have renewed focused on whether or not nonprofit organizations are fulfilling their mission in accordance with the law. Even the media, members, prospects and competitors are carefully watching your association.

For these reasons, you may want to spend some time on the organization's principles, ethics and conflicts of interest. In your role as president, you will be the leader in promoting and enforcing values.

An example of a conflict of interest would be a board member voting on an issue that he or she secretly knows there will be some personal economic benefit. Maybe the motion is to offer educational courses and the board member does not reveal that he or she would like to be the one selected to teach the courses for the organization. The discussion may have been different if disclosure was made and the member offered to excuse himself from the vote.

Many organizations have adopted a “values statement” that guides the board and staff with stated principles. These statements commonly include bulleted principle statements that describe the importance of diversity, perseverance, member responsiveness, influence in the community, transparent operations and leadership development, for instance.



TIP: The IRS is asking nonprofit organizations if they have a conflict of interest statement on Form 990, the annual information return. You can set the tone of your year by describing what would be considered a conflict for board or staff and requiring disclosure if they arise.

It’s Not about Popularity

While you may be the nicest man or woman on the planet, when it comes to leading the organization there will be times when being a nice guy has no bearing. If you try to please every person at the board table all the time, you’ll be stretched thin.

You won’t be able to please all the people all the time; that’s not your role. Leadership will require tough decisions, some of which that might upset people. But you’re working for the future of the organization, not trying to increase friends.

In fact, you may have fewer friends as you end your term because you were a president who required accountability. What is important to measure is whether or not you improved the organization, added value and advanced the mission and goals during your term.



TIP: When you have to make tough decisions, such as dropping a committee or disciplining a board member, try to focus your discussion and attention on the position and not the personality. For example, you may want to discuss the position of the committee that has not accomplished its tasks, as opposed to referring to the person by name or personality.

Making Tough Decisions

Be decisive and make tough decisions when necessary. Members, stakeholders, staff and the directors will look to you for leadership – after all, that’s why you were elected – to lead the organization.

Consensus building is a good way to ensure that a decision made by the board is one that can be lived with in the long term and for all of the board members to support regardless of their individual view on the issue. But, there will be moments when the president

“CONSENSUS: An opinion or position reached by a group as a whole.”

needs to bring clarity to an issue or make a final decision that may not be popular but needs to be made.

There are too many presidents who don't take the reins when necessary, thus appearing weak. There is also a difference between making decisions and serving in a dictatorial position. The well-balanced leader will gain support of his board no matter what decision is made.



TIP: Some of the best presidents are those who hold their opinion for last. They don't want to influence outcomes but prefer to encourage a fair and open dialog, and then offer a wrap up of the conversation --- including their valued input --- before the vote is taken.

Read the Communications

There are presidents who understand the importance of communication, and those who fail. Our favorite is the president who says to the staff, "I'll be available anytime you need me during my term of office." The opposite is the president who is missing in action throughout the year. You never want to be described as "MIA."

As silly as it sounds, you need to thoroughly read every newsletter. Be aware of the website and its contents. You'll stay informed and have a way to understand what's on members' minds by reading their messages.

Minutes are another item you'll want to read carefully. They are a legal record of your meetings and you want to be sure what occurred is accurately stated. Finally, plan to read staff and committee reports carefully.



TIP: If you feel there are too many reports, then advise committees and staff of the format and frequency that you wish to receive them. If there are too few reports, as the president you can start the year by indicating what reports you expect to receive from board, committees and staff, and in what format (faxed, e-mailed, attachments, mailed, etc.)

Travel Requirements

There are likely some reasons you will be expected to travel. Review the travel schedule with staff. For example, there may be national training opportunities, required visits to the capitol, and the need to visit chapters.

Plan your annual calendar with enough time to fulfil travel commitments. In nearly every case, your travel will benefit the organization by learning new skills, gaining new information, and communicating with new persons. Don't shy away from the

responsibility – yet don't take advantage of it by overspending in areas the board would object to (i.e. in-room movies, alcohol, class of service).

Discuss at the start the parameters of travel. Find out what is reimbursable and what is not. If a spouse or guest accompanies you, what is the policy on registration or reimbursement? What is the budget for presidential travel?



TIP: The staff is neither your travel agency nor credit card. Make arrangements at the start as to who will make reservations, preferred methods of payment or reimbursement, whether or not you will be bringing guests, etc.

Cultural Expectations

Cultural standards are expectations of volunteer leaders developed over time, which may *not* be written in the bylaws or other governing documents.

For example, if the organization has a political action committee (PAC) it is common to expect board members to take a lead in being significant contributors. The problem occurs when a board member has not been informed of the cultural expectations and in turn cause some strife for not taking action that the rest of the board considers “normal.”

Here are some other examples of cultural expectations that many organizations hold dear but seldom put into writing:

Professional attire is expected at official functions and/or board meetings.

Directors of the board are expected to serve as ambassadors when attending chapter and member meetings; arrive early.

Members of the board are asked to help raise funds by asking members to join, encouraging suppliers to underwrite sponsorships and/or contributing to the PAC.

Open communication is respected and it is asked that blind copies of e-mails among board members are not hidden from the president and chief paid executives.

Directors set the example for timely reports, follow-through and accountability. Each director visits at least two chapters per year.



TIP: Consider the established cultural expectations in your organization and write them down as a part of an orientation guide for new volunteers. It will help them understand the culture and expectations of being an active volunteer. If for some reason a director is uncomfortable with the expectations, talk to them about other ways to fulfill the duty. For example, if

their company forbids them from contributing to a PAC, ask if they can help in another area that benefits the organization.

Express Gratitude Often

The two simple words of “Thank You” are some of the most important words a successful president will utter.

You will have volunteers and staff working for the organization that put a great deal of passion into what they do. Expressing gratitude in various forms is saying, “I appreciate you and the work that you do for this organization.”

In addition to an ongoing approach to express gratitude, you will probably end your presidency with an awards or recognition ceremony. Awards such as “Member of the Year” and “President’s Merit Award” should be on your mind from the start. Keep a file of the awards you are expected to present and the standards you will use to select worthy recipients.



TIP: Think in advance how you will be thanking your team of volunteers and staff. You might find a way that matches your theme. For example, if government affairs your top priority, maybe your state capitol has a gift shop with items such as the state symbol on coasters, lapel pins, etc. A trophy or specialty shop can design special recognitions to reflect your year’s theme and outcomes.

Planning

Start Long Before your Term

Most incoming presidents know well in advance when their term starts because they have served a year as the president elect or the vice president. The preparation you undertake prior to your installation ceremony will effect your term’s outcomes and achievements.

Ideally, the incoming president has had a year to plan. If you wait until just weeks before taking office to prepare, you can lose your entire first quarter of the presidential year.

Too often we have heard president’s say at their first board meeting, “I’ll announce my committees by the next meeting,” or “I’ll make sure my plan of action is available at our second board meeting.”

Why wait? Prepare at least 60 days prior to your first meeting so that the team, information and traction are there for a successful term of office.



TIP: Once you are in office, you will lose the free time you had to prepare for your term. You cannot anticipate what crisis will require your attention when you might have hoped to draft your first president's message or plan for your board meeting.

Set Realistic Goals

Every president brings desires and goals to the table. It is normal to want to leave a legacy for which your term is remembered. Approach your legacy with caution.

The most successful presidents are not those who create a list of goals, but the person who understands his or her responsibility is to advance the organization's goals. If a strategic plan exists, it becomes easy to continue working on the plan that was probably adopted by a prior board. The organization's goals do not change with successive presidents.

The best way to set goals is to consider how they fit into the existing mission statement and strategic plan. Don't be the president that surprises the board and staff by setting priorities that do not synch with existing goals. This will cause resentment and resistance as you disregard the existing plan and disrespect the work of prior leaders.

The president's job is not to build an empire but to be the consummate leader at advancing the mission and goals to best serve the needs of members. You want to be remembered for staying the course and serving the community by sticking to the current direction with course corrections based on environmental scans such as new challenges and opportunities.



TIP: A realistic number of goals in a strategic plan are just three to seven. Some presidents start the year with a laundry list of "good ideas." The most successful organizations stick to their purpose (mission statement) and focus on their core competencies (goals.) With this information, you can consider if your personal plan or existing strategic plan is on target, too long or too short.

The Importance of your First Board Meeting

Your first official meeting of the board will set a tone for the rest of the year. Through this white paper, you have done plenty of homework to build a team and gather key information.

Imagine the president who walks into his or her first meeting, arriving late, the room is set up poorly, the agendas are inaccurate and there is no clear message. Contrast that to

a president who arrives early, ensure the right people are at the table, protocols are followed, and a clear message is delivered about desired outcomes and working as a team.

Perception will become reality. Remember that most of your team members are volunteers --- they have the choice to work hard or to coast through the year. They'll take their cues from you. Similarly, staff will be interested in your initial actions and messages.

It can not be understated how important that first board meeting will be to you in preparing for and communicating your plan and expectations.



TIP: Manage your message through preparation for each meeting. Listen, learn and confirm through discussions with your team of volunteers, staff, committees, and chapters. Re-emphasize to them what needs to happen to advance the organization's goals. Thus, when you get to the board meetings, there should be no surprises --- you should be able to stay on task in accomplishing the plan of work outlined at your first meeting and aligned with the strategic plan.

Identify Quick Successes

You might want a strategy of identifying and producing some immediate achievements. Consider what is practical and possible in your first 100 days.

Your leadership team and staff may buy-in to your list of short-term achievements and help ensure quick successes. Quick successes keep everyone energized and focused. Long-term goals are harder to see progress and to track.

For example, you may notice the membership growth is nearly reaching a milestone, say 1,000 members. Be ready to work hard to reach that milestone and celebrate the results early in your term.

Pick some items that will be quick successes that will build momentum and loyalty for your year ahead. As you select them, let people know you have a 100 days plan, commit to them by writing them down and getting enthused about the opportunities for immediate successes.

Inventory Benefits and Services

An incoming president has the opportunity to begin a process of evaluating the services of the organization --- determining if there is value to maintain them or to modify them in some fashion. Also, it is not out of the question to "barbeque the sacred cows" that are draining volunteer and staff time but not contributing to the overall value proposition of the membership.

The key in this type of evaluation is step gently as there are past leaders that have initiated these programs. When a “sacred cow” is identified, the president may want to contact the leader who put the program in place and determine together if there is a real need for it any more or if a modification could make it more valuable. This team-based approach provides for a more collegial atmosphere and continues to build upon strong prior relationships with those that have shaped the organization in the past.

For the benefits that are maintained and offered to members, ask that the board use the benefits. It is perceived as hypocritical by members if the board recommends or endorses benefits but does not use them. Board members should be leaders in knowing about and using the benefits and services of the organization.



TIP: When it comes to programs, activities, benefits and services, some volunteers feel it is their job to *add* to the list of member offerings. Consider sometimes “less is more.” It may be smarter, using fewer resources, to offer two or three highly relevant member services, than to offer a package of a dozen irrelevant, *fluff*, benefits.

Dust off the Strategic Plan

The reason the section is titled, “Dust off the Strategic Plan” is because too many organizations create a plan and then let it collect dust on a shelf.

The organization should have a strategic plan. If it does not, then it should be an immediate task of your administration --- to set clear goals and strategies for achieving them.

The plan is your roadmap --- identifying priorities in the immediate and long term. A good plan also offers strategies and projects to be undertaken over several years. Most plans cover a period of three to five years.

Seldom is there a reason for an incoming president to come up with a list of his or her own projects. It should guide the successive presidents.

Review the plan with staff, checking off what has been accomplished, and making notes about what is in the plan that you can achieve in your term of office. Some of those goals may require several years, others will be easy to achieve.



TIP: If no plan exists or it is outdated, discuss this with the board and make a commitment to draft a strategic plan during your term of office. A nice legacy is to be the president responsible for creating a dynamic long-term plan for the association.

Performance Measures

There are many ways to measure performance. There are audits conducted by professionals such as a legal audit, financial audit or governance and operations audit. And, there are performance measures that can be monitored by the president, board and staff.

For example, consider these benchmarks and how your organization measures up:

- What percentage of members do you have compared to the entire population of prospects?
- What is the member retention rate; percentage of renewals each year?
- What percentage of your budget is derived from dues, compared to non-dues?
- What percentage of your annual operating budget is set aside in a saving reserve for emergency or future projects?
- What is the most relevant, valued member benefit and what is its impact on retaining and recruiting members?
- What is the size of the board of directors; is the governance structure appropriate for achieving the mission and goals?
- Is the strategic plan advancing; how much has been accomplished and how much remains in the designated time period?
- There are comparative studies, benchmarks and operating ratios that can be acquired to compare and contrast your organization. A priority during your term is to have confidence that the organization is comparable to or excels when measured against similar nonprofits.

Calendar and Meetings

Rely on your calendar from the start. You, and everyone else, have a busy schedule. You will want to identify and save the key dates during your term of office. It would be very embarrassing to miss the annual meeting or a board meeting because you did not protect the date.



TIP: Watch out for holidays! You don't want to schedule a meeting on Mother's Day if the board would find that an awkward weekend to meet, for instance. Also watch for religious holidays and official voting dates. If you do not consider these in advance, chances are you'll waste time on rescheduling meetings with conflicts.

Just as important as protecting dates is the value of an hour. Make sure that meetings start and end on time. If people are late for your meetings, have a sidebar conversation about how inappropriate that is for achieving the work and respect the board.

Meeting Agendas

The president is responsible for the agenda, though you're likely to have plenty of help from staff. Craft an agenda that covers what needs to be achieved during the meeting. If you leave items off and add them, you'll find it difficult to stop directors who also want to add work to your agenda. Thus, a well-crafted agenda is a skill of a good president.

If you find yourself without important business to add to the agenda, ask yourself if it is really necessary to hold the meeting. Similarly, instruct your committee chairs to create agendas; and if they have no reason to meet, they should not call meetings for the sake of scheduling a meeting. Volunteers will resign quickly if they feel their time is wasted.

Draft an agenda so that it flows. Place difficult or controversial topics in areas when the meeting has energy and clarity, adding upbeat topics in between. Caution: The bylaws or your adopted rules of order may prescribe agenda format.



TIP: A consent agenda is a tool to streamline meetings and reduce reports. It allows for a single motion to review the routine, mundane and/or non-controversial issue. If you are not familiar with the consent agenda concept, ask the board and staff for help.



TIP: Figure the minimal value of the meeting you called by multiplying the number of volunteers' time their hourly worth of \$50, times the length of your meeting. Thus a meeting of 20 board members for three hours equals \$3,000 (exclusive of preparation, travel and actual meeting costs.)

Common Mistakes

The list is long --- this guide is to help you avoid the mistakes. Here are just a few we've seen incoming presidents make:

- Planning late or thinking planning will not make a difference.
- Not building a team – thinking you can do it all yourself.
- Thinking presidency means being the chief staff executive – wrong, they are very distinct roles with both being essential.
- Not understanding the resources – thinking the resources are yours for the spending.
- Asking half way through your term, “Do we have a strategic plan?”
- Injecting your personality into everyone's good intentions.
- Petering out before your term ends; finding priorities more important than the organization in which you took the presidency.
- Over-delegating and not being engaged enough to impact change.

Resources and Structure

Scan the Environment

A critical success factor is understanding the constituency you are serving. Performing a quick scan either through a member needs and satisfaction survey or other means to gauge the pulse of members is key to doing a good job. Note: Sometimes it is said that the board is the worse decision making body because they are out of touch with reality as they govern at a higher level.

Some presidents lose touch with members, chapters, etc. during the process of governing. Some think a relationship with staff is all they need. Thus, you should purposely allocate time to visit chapters, hold focus groups with past presidents, and call on key decision-makers. They will be honored you asked for their opinions.

To formally conduct an environmental scan, you may use the SWOT process. It is a discussion and review of the organization's Strengths and Weaknesses, followed by Opportunities and Threats; hence the acronym SWOT. If the organization has undergone a SWOT analysis in recent years, ask for and review a copy to see how things have changed or stayed the same.



TIP: When you travel on business or personal time, consider if there is a member or stakeholder to visit while you are there. Schedule a lunch and listen to what they have to say. Your constituency will never lie as they are trying to get the most out of the organization, and they will be honored the president took the time.



TIP: For added input, you appoint an advisory task force of constituents to whom you can turn for advice throughout the year: for example, a Council of Past Presidents, a Suppliers Council, or a Future Leaders Committee.

Review Organizational Documents

The nonprofit organization is guided by key documents. Many of them are legal, prescribed by state and federal government. Others are culturally or adopted over time, such as leadership manuals and policies.

Ask for and read them for understanding. In the role of president, you may have to rely on or reference the documents. The paid staff will be able to provide and explain the documents and their purposes. You may also call on the counsel of an attorney, accountant or insurance agent to understand the documents.

- Leadership Manual or Board Book
- Bylaws
- Article of Incorporation
- Mission Statement and/or Statement of Purpose
- Policies or the Policy Manual
- Strategic Plan
- Budget and Financial Reports
- Marketing Plans
- IRS Tax Documents (Public Records)
- Staff Job Descriptions
- Pending Contracts



TIP: You may want to prioritize what you read and their importance to the organization. The mission or statement of purpose is linked to the federal government, IRS. The state government approves the articles of incorporation. And the bylaws are a document informing the membership and stakeholders how the organization will be governed.

The Play Book

Most answers to leadership questions are found in the board book or leadership manual. Your team should rely on it as if it was their *playbook*.

For example, a new board member is able to get up to speed on an issue because it includes recent minutes. Or board members understand the official processes of the organization because there is a section on policies.

A board book should be comprehensive, giving volunteer directors the information they need to be good board members.



TIP: Create a board book that includes tabs for easy reference and a section to insert minutes from each meeting. Ask directors to maintain their own board manual, keeping it up-to-date and bringing it to each board meeting.

About Policies

An organization adopts policies – an important role of the board. Policies are the wisdom of prior boards indicating how best to govern and manage the organization. They help to interpret and frame the bylaws and articles of incorporation.

They are found in the board meeting minutes as motions. More practically, they should be included as a policy manual.

For instance, the bylaws may require “an annual review of the finances by an independent authority.” The board may have adopted a policy that reads, “Annually, the board will adopt an Audit Committee to select a CPA who will conduct an audit of the organization’s finances.”

In order to avoid making decisions over and over again, establishing policies will help make for a more efficient board and meetings.

Policies also provide staff with board approved guidelines in which to manage. For example, a member cancels their registration prior to the annual meeting. A staff member gets a call and doesn’t really know how to respond. This creates an e-mail nightmare with the board working on a policy for that special case.

What typically happens in these cases is that the decision is made but there is no written policy. The next time it happens, the same process follows, thus wasting time because a policy was not adopted when the issue arose the first time.

A comprehensive policy manual is the key in maximizing efficiency and providing latitude for staff to make decisions.

Note: Policies are not procedures. Procedures are administrative responsibilities, developed by staff. For example, procedures identify steps for backing up computer data or for processing a new member.



TIP: An easy way to collect and document your policies and procedures is to review past minutes and note each board action as it relates to a certain area or topic. Any items that did not get a full vote should be listed in the document as pending and voted upon during a board meeting.

Financial Considerations

Besides people and volunteer resources, the next most important aspect is likely to be finances. The budget and financial reports will guide you as to the expectation and priorities.

Inventory Risks

One role of the board and president is to protect the organization. The board has the fiduciary responsibility to represent and protect member interests. The board is the steward of the organization at this point in time, in an organization that might be decades or centuries old --- and shall have a long future.

In a business its called “risk management.” Discuss with staff if they feel there are any apparent risks. Ask the same of your executive officers. Your goal is to eliminate or minimize potential risks.

For example, are the appropriate safeguards in place to avoid embezzlement of funds? Does the board understand antitrust avoidance? Does the organization have a relationship with a CPA and attorney? What insurance coverages exist and are they sufficient? Is the intellectual property protected? Are required filings and reports properly handled?



TIP: If you are not familiar with risk management for a nonprofit, you can rely on the counsel of legal, accounting and insurance professionals.

Resources

If it was your own company, you’d know where to find excellent resources. But because it is a non-profit organization, we have identified many proven sources of help.

This is a small sampling of the resources identified with excellent resources for the president of a non-profit organization.

Organizations

ASAE and the Center for Association Leadership - ASAECenter.org

US Chamber of Commerce – USChamber.org

American Chamber of Commerce Executives – ACCE.org

BoardSource – BoardSource.org

Publications

Fast Company – FastCompany.com

Good to Great – JimCollins.com

Execution, The Discipline of Getting Things Done

The Five Dysfunctions of a Team: A Leadership Fable

E-Myth Revisited – E-Myth.com

The Perfect Board – ThePerfectBoard.com

Your Director Hat – YourDirectorHat.com

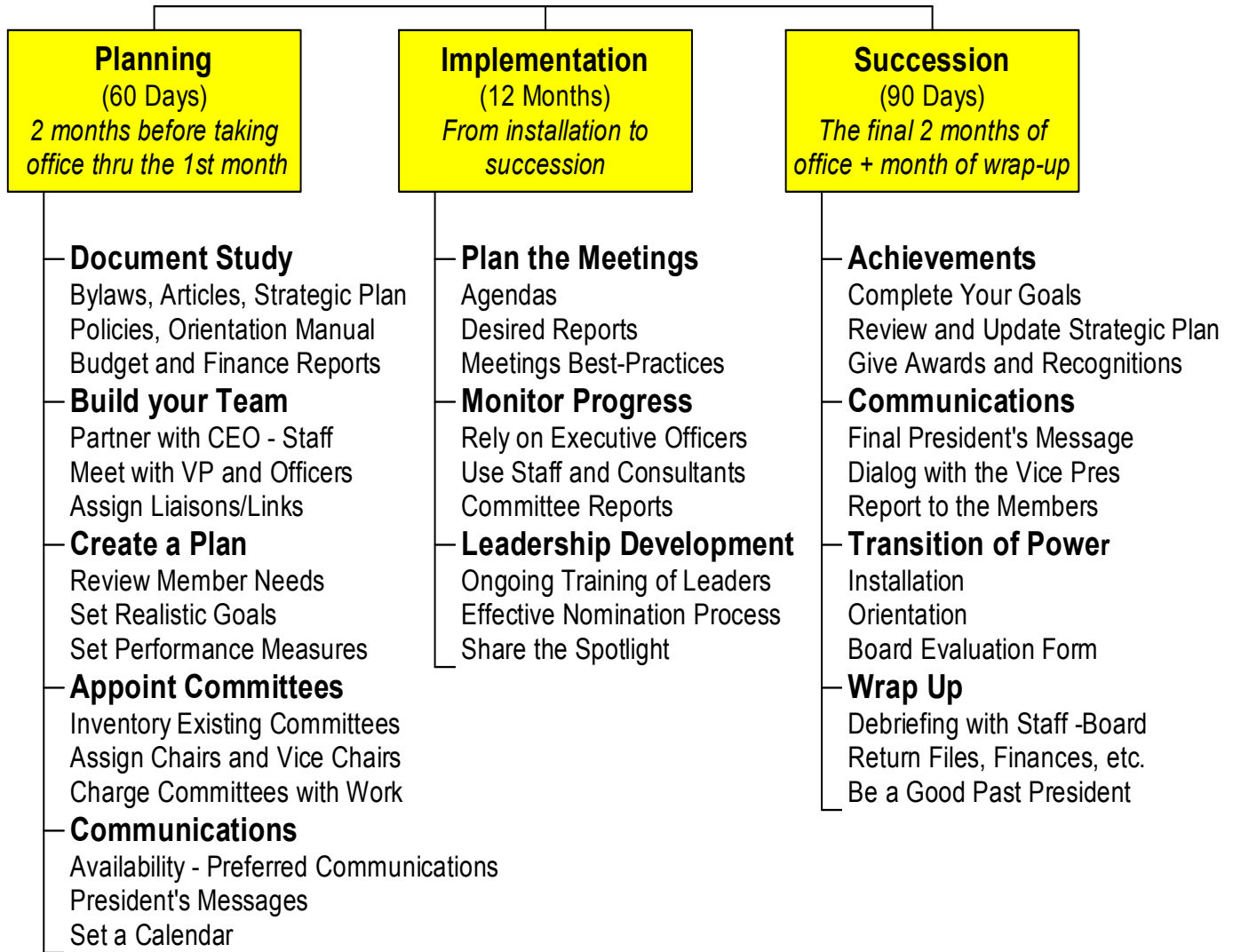
Association Self Audit Manual – NonProfitCenter.com

Board Responsibilities (laminated guide) – NonProfitCenter.com

7 Measures of Remarkable Associations – ASAECenter.org

Tables and Charts

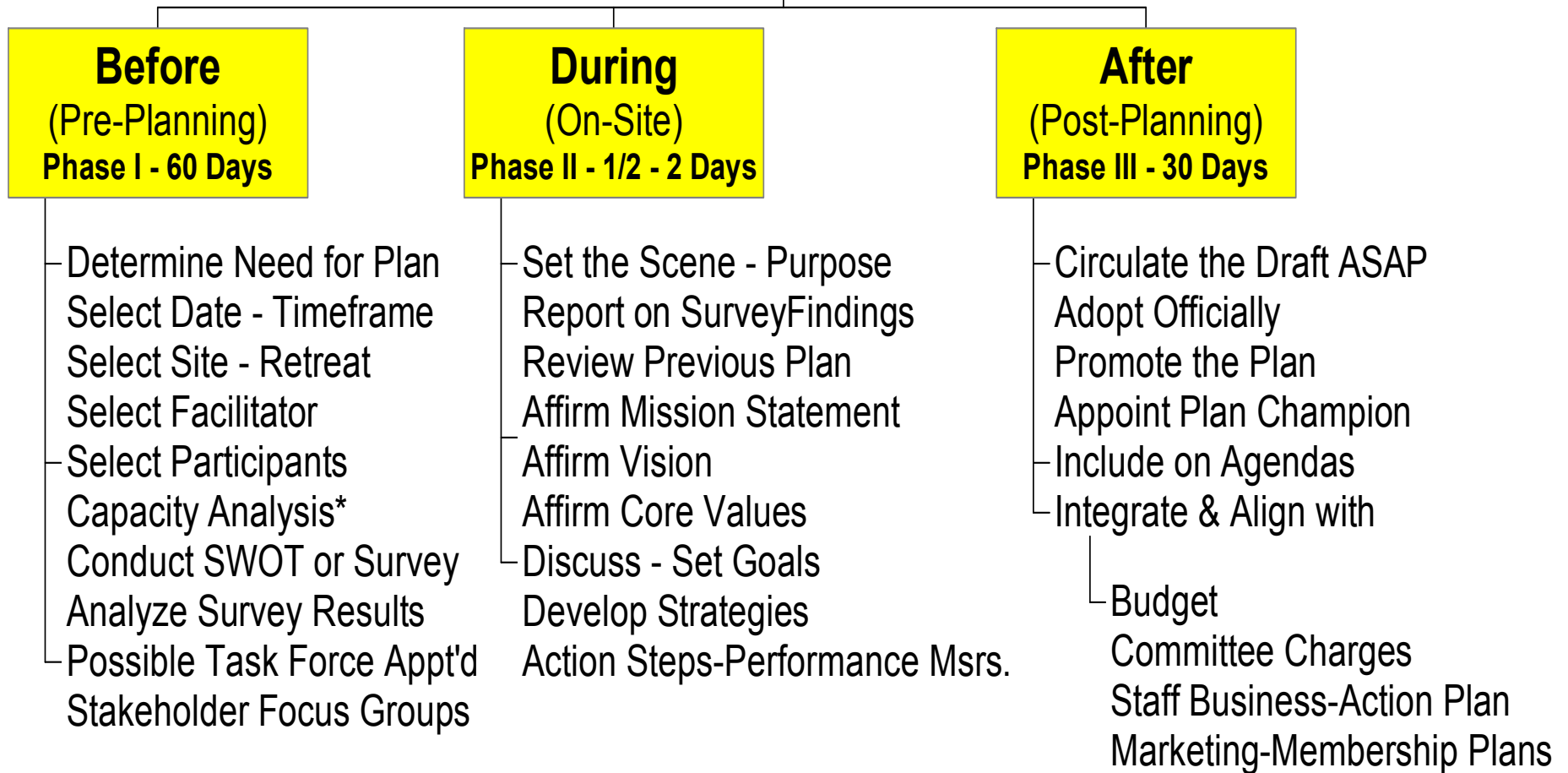
Phases of the President's Year



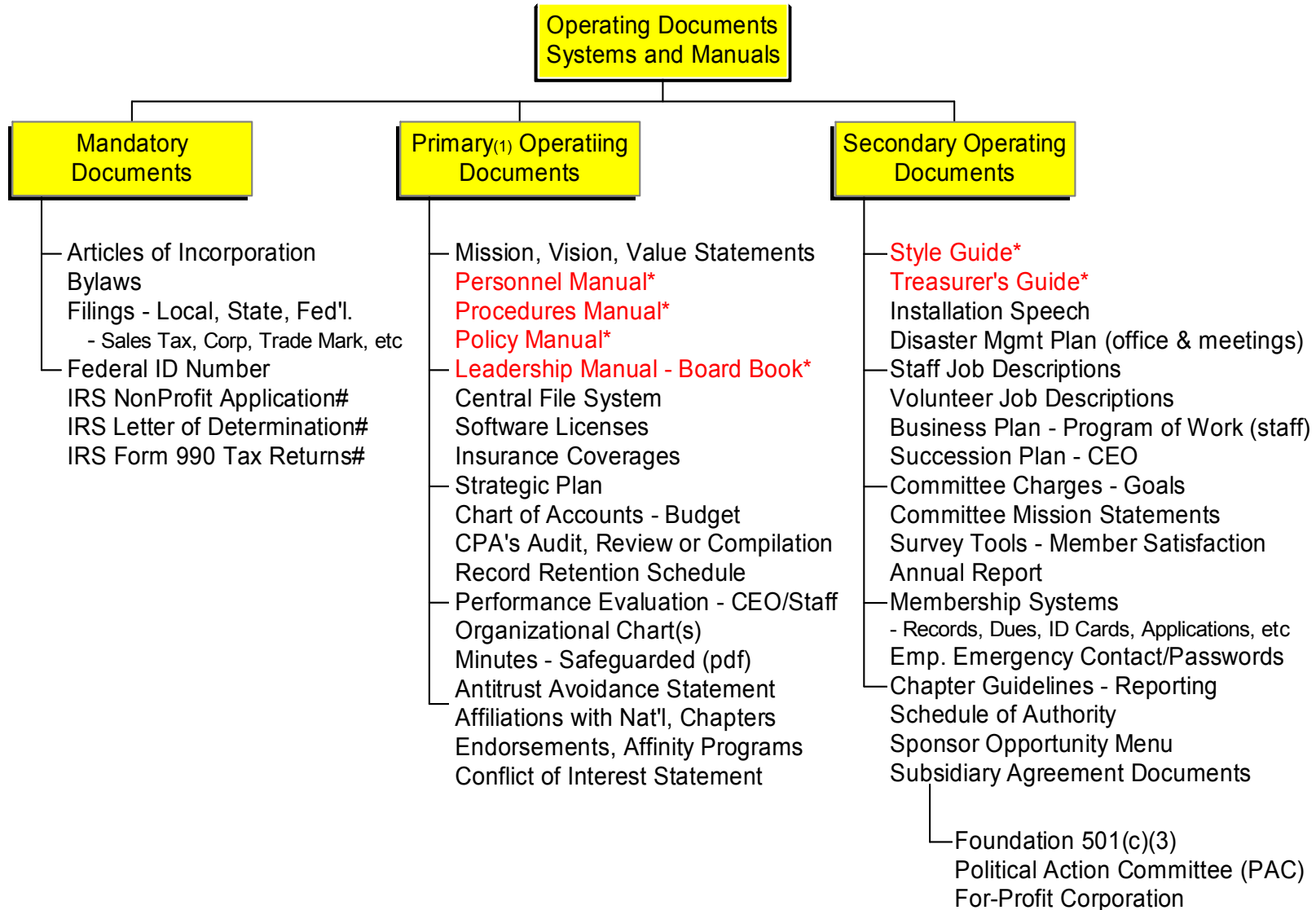
Leadership Training Programs – Suggested Training Modules				
	Level 100	Level 200	Level 300	Level 400
Description	Overview of the unique aspects and societal impact of nonprofits.	Responsibilities of the board of directors.	Strategic direction and finances/resources.	Specialized topics and additional speakers or panelists.
Topics	<ul style="list-style-type: none"> • Rich history and founding of nonprofits. • Societal benefit and economic impact. • Unique terminology. • IRS designation-implications. • Organizational structure and subsidiaries. • Governance styles, structure and board duty. • Q & A - Discussions • Case Studies/Examples 	<ul style="list-style-type: none"> • Board responsibilities (10) • Legal principles (3) • Protecting the nonprofit (risk management.) • Scrutiny on boards and Sarbanes Oxley • 7 Principles* • Meeting best practices; agendas, minutes, etc. • Planning a board retreat. • Board resources. • The Pres.-Exec <i>Dialog</i> • Q & A – Discussions • Case Studies/Examples <p>*Confidentiality, Business Mindset, Members First, Its a Team, etc.</p>	<ul style="list-style-type: none"> • Facing trends and challenges. • Mission, vision and values • Goal setting and strategic planning. (long term) • Business plan (short term) • Performance measures in nonprofits. • Best use of committees. • Leadership development and nominations. • Finances and resources. • Outsourcing and consultant relations. • Q & A - Discussions • Case Studies/Examples 	<ul style="list-style-type: none"> • Environmental scan (industry spokesperson or staff.) • Budgeting, finances and audits (CPA) • Antitrust-Legal Issues (Attorney) • Rules of Order (Parliamentarian) • Insurance coverages (Agent) • Crisis Management (PR) • Government Affairs (Lobbyist) • Selling Membership (Specialist) • Coalition Building (Specialist) • Operations (Harris)
Supplemental speakers.	Organizational Overview by Staff	CPA, Attorney Parliamentarian Review of the Board Book Chairperson Skills	Staff Specialists	Panels, Roundtables, Special Sessions

Strategic Planning Process

Strategic Planning Process
(90 Days Start to Finish)



Operating Framework – Business Model



100+ Tips for the Incoming President
By Carolyn Gardner¹ with Bob Harris¹, CAE

“Don’t take yourself so seriously” ...and other nuggets of presidential advice!

Responsibilities to the Organization

1. The first three months of your term are the most time consuming.
2. Two months before you take office is often has the highest dividend for planning your year.
3. The association² belongs to the members, not to you.
4. Contact a *new* member to serve on an important project, program or committee; you’ll be surprised years later when they recall that you were first person to ask them to take a leadership role.
5. Be able to recite the mission statement – memorize it.
6. Volunteers want to make meaningful contributions – consider yourself as a conduit or facilitator.
7. The president and the executive director work best as equal partners.
8. Serve food at meetings; but avoid too much sugar.
9. Don’t ask the staff to do anything personal for you. They are paid to manage the association – not to manage you.
10. Do away with “tired committees;” establish quick response task forces when they are needed.
11. You are the elected president; not the king or queen.
12. When you spend money, always be ready and able to justify that it is in the best interest of the organization.
13. Know the law and the code of ethics – don’t break either.
14. If you write your president’s message in the newsletter – do it with intelligence and good grammar, don’t ask staff to write your message. Consider that it will be in the association’s permanent history.
15. Your term is most likely only 365 days; then you are history.
16. Visit the members in person or make personal calls to let them know you’re a good listener and care; invite their participation.
17. Really know the bylaws and policies.
18. One of your roles is to develop future leaders.
19. On the board, you represent the association; *not* yourself or your firm.
20. Reserve a portion of each board meeting for futuristic “thinking.”
21. No one can do this job alone; build your team early in the process.
22. Understand financial statements; insist on an annual audit.

¹ Carolyn Gardner can be contacted at the Florida Association of Realtors. Bob Harris can be contacted through www.nonprofitcenter.com

100+ Tips for the Incoming President

23. Watch what you say at the podium...never hurt anyone with words.
24. You'll need to communicate effectively during your term – get the training necessary.
25. Let the vice president or president-elect learn as much as possible during your term.
26. Avoid accepting gifts that may create an impropriety – set high standards for your year.
27. Give members a reason to come to and enjoy your meetings.
28. Encourage 100% accountability among your volunteer leadership team.
29. On average, only 5 to 15 percent of your members/stakeholders care to serve in leadership positions.
30. Hold a leadership retreat before your term begins.
31. Today's members are innovative and expect their association to be similar.
32. Take antitrust concerns seriously. Penalty is jail time and more.
33. Understand you are leading a professional organization; not a social club.
34. Be up front with your executive director on all issues.
35. Respect your executive director, he or she is a true professional.
36. Ask your executive director's advice before you do something controversial.
37. Defend the board's position as your own, even if you didn't agree with it.
38. Remember to consider diversity and inclusivity as you make appointments and build your leadership team.
39. Streamline board meetings with well-planned agendas, consent agendas and rules of order.
40. Every association has red ants – learn to deal with them.
41. Attend at least one meeting of each of your committees; as a show of support – not to run the meeting.
42. Study the organizational chart; if you don't have one – create it so that you understand the proper flow of information and hierarchy.
43. Remember that many of your board members were told, “You won't have to do anything when you get on the board!”

Desirable Traits and Communications

44. Be the leader your members will respect and trust for years to come.
45. Show respect for time. Meetings should start and end as announced.
46. Take your role, but not yourself, seriously.
47. Avoid secrets and promote transparency.
48. Listen to the whispers and you'll avoid the shouting.
49. You can't please everyone but strive to be respected by everyone.
50. Don't neglect your family or business. They need to be there and healthy when your term is complete.
51. Stay physically fit – stress kills.
52. Be flexible. It's not important that you always win.
53. Praise in public; criticize in private or not at all.

100+ Tips for the Incoming President

54. Contribute to the association's causes and urge others to follow your lead.
55. Be happy...smile a lot.
56. Never say, "We have always done it that way" or "we tried that once before."
57. Don't operate in a vacuum – know the strategic direction and operation of related parent and chapter organizations (including any subsidiaries.)
58. Learn to work with members of different age groups, interests, work settings and cultures --- promote diversity.
59. Desire to be inclusive --- dismantle the "good ole' white boys club" image.
60. If you aren't moving forward, you are losing ground; you'll find a year will be over quick.
61. Never use your position for personal gain.
62. Never jeopardize anything said to you in confidence.
63. Tell meaningful stories but not stupid jokes; anything inappropriate stated in meetings and e-mail will bite you.
64. Everyone's opinion counts, especially if you are on the opposite side.
65. Mix and mingle with the members before every meeting; avoid head-table-snobbishness.
66. Call on other leaders (past and present) for counsel; you're not in this alone.
67. Admit your mistakes; no one has ever done this job perfectly.
68. Don't be embarrassed to say, "I don't know."
69. Even a blank sheet of paper has two sides; be a good listener to others' input.
70. Consider taking "the road less traveled."
71. Mistakes are the basis for experience.
72. Make a point of introducing yourself often to people of influence; reach out to meet others.
73. Change will happen whether you are ready or not; don't fight it.
74. Allocate time to read, read and read.
75. Communicate, communicate, and communicate. And then again.
76. Members don't always read. Sometimes you need to communicate in a different way; plan on communicating your most important messages at least 3 times to be understood.
77. Own up to hurdles that may occur during your term; don't let surprises ruin your term.
78. Be the organization's main cheerleader.
79. Have the courage to admit someone else may have a better idea than you.
80. Attitude is everything.
81. The process of how you do it is often as important as what you do.
82. Don't take criticism personally.
83. If you promise to get back with a member, do it the same day, if possible.
84. Don't procrastinate on the hard decisions. Nobody appreciates a fence-sitter.
85. Give credit often to volunteers, staff, etc.
86. Follow the KIS theory – Keep It Simple.
87. There is a better way to do most everything – don't reject new ideas (and technology).

100+ Tips for the Incoming President

88. Respond promptly to email and telephone calls.
89. Promote the organization by wearing a lapel pin and use the logo appropriately.
90. Don't shrink like a violet when the difficult times come. They, too, will pass.
91. Invite everyone to enter with their opinions, but to expect to leave with a decision.

Outcomes

92. Your job is to advance the existing strategic goals; not to make a to-do list of projects you want to do during your year.
93. You've heard the adage: ask a busy person to do the important jobs (they are proven to have good time management skills.)
94. Do fun things frequently during your term – life is short!
95. Remain focused! You'll find it easy to get off track.
96. Put the important items at the top of meeting agendas.
97. Have fun by keeping a journal and taking pictures.
98. Perception is reality.
99. Review your accomplishments every three months and make course adjustments.
100. Membership is voluntary; you want to end your term with more members than when you started.
101. Get the association involved in a project that has societal benefit.
102. Follow through with your promises and hold your leadership team accountable.
103. Celebrate small successes; they will add up by the end of your term.
104. Don't major in minor things. Give each issue only the time it is worth.
105. The road to success always has a few bumps.
106. Consider yourself as the steward of the organization whose outcomes will be remembered for years, decades or longer.
107. Two or three homeruns will be considered a successful year.
108. Don't take your eyes off the goal.
109. If you're not at the table, you're probably on the menu!

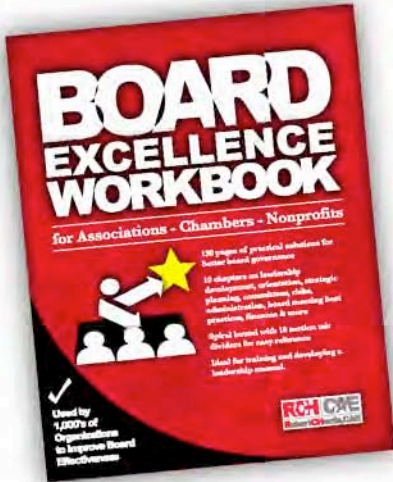
Note: Additional free information to help associations and elected leaders can be found at www.nonprofitcenter.com.

ⁱ Bob Harris, CAE
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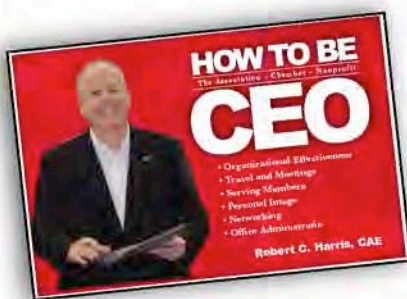
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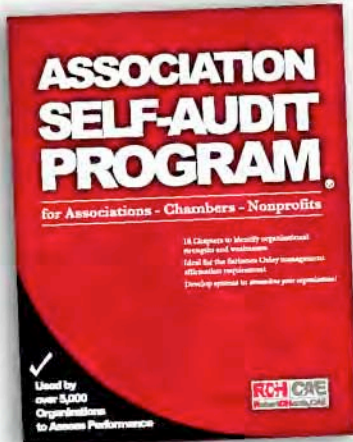
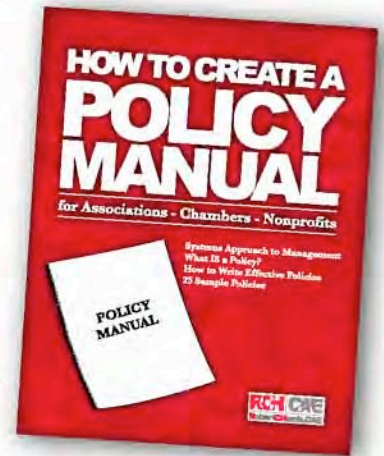
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Zip

“This guide is chock-full of tips for presidents of associations, chambers, fraternities and other nonprofit organizations”



Bob Harris, CAE, serves on the faculty for the US Chamber of Commerce. He has authored several books on association management and created the Association Self-Auditing Process, which has been used by 10,000 organizations.

Bill Pawlucy, MPA, CAE has spent over 20 years in the customer service field in both the for-profit and nonprofit arenas. He has served as a volunteer leader, led several nonprofits and brings a wealth of knowledge to nonprofit executives. He currently serves as Head of Association Relationships of Investools, Inc., an IACET Accredited Investor Education Company.



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