

Inadequate Staff Support

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The preceding five articles in this series have identified some fundamental problems that many small associations face, and straightforward solutions for each one have been recommended. However, for every association or non-commercial organizations, the scope of its programs and its ultimate success is very much dependent on the *quality* of its staff. Even a small, financially-strapped association must develop a 'staff structure' or it will never develop beyond organizational infancy. To assure that it will survive in the 21st century, and be able to face the challenges and to take advantage of the opportunities presented, an association must have an effective central administration in place.

Ineffective governing board

(Problem 1)

If a governing board is disorganized and ineffective, the association will eventually die. With experienced staff support, however, board members are capable of reaching beyond their organizational limitations and leading the association with insight and confidence.

Without crossing the boundary between policy 'setting' (board responsibility) and 'implementation' (staff responsibility), an experienced and capable senior staff member can help a board deal with complex issues effectively and efficiently. If the board/staff relationship is operating properly, both the board and the staff can exercise their authority and assume their responsibilities for the benefit of the association. However, respect for staff by the board and respect for the board by the staff is essential.

An experienced staff person can help the chairperson organize and run effective board meetings by preparing briefing materials to go to the board members well ahead of the meeting; by arranging for an appropriate setting; by helping the chair keep the meeting agenda on schedule; and by making sure that minutes are taken and distributed. Staff work with board committees is invaluable also, as staff are the most knowledgeable people about the internal functioning of the association.

Even when identifying potential board members, senior staff can provide valuable advice. They know the reliable and interested members who have demonstrated a willingness to work in the best interest of the association. This confidential relationship will not jeopardize the authority of the board, and recognizes the professional partnership that should exist between the board and staff.

Lack of financial control

(Problem 2)

When a governing board accepts its major *fiduciary* responsibility to the association and its members and adopts sound financial policies, it must rely on staff to carry out the day-to-day tasks and to utilize sound judgment.

Experienced staff can draft budgets for review and revision by the elected treasurer and the board, as they know the financial condition and operations better than any board member. Staff will be the people that generate the quarterly financial statements and circulate them to the board for review, with comments to help board members understand the programmatic implications of the balance sheet and income statement figures. And even though the independent auditor's annual report will be directed to the board, the cooperation of staff is needed. A competent senior staff person, having integrity and experience, should be the one to sign the checks, not the elected treasurer. And it will be the staff that makes sure that everyone, including the board, stays within the adopted budget.

Low membership size

(Problem 3)

While it is up to the leaders to define an *association's purpose* and the *benefits* of membership, efficient association management leaves the implementation of membership administration and development to staff.

Competent staff members are constantly seeking ways to improve the 'service' aspect of the association because they usually understand the association's purpose from the perspective of the member better than the leaders. Good staff members also are keenly aware that a growing and dynamic association is a viable vehicle for their own professional careers, and the return on their membership development efforts is often the most satisfying aspects of working for an association. Implementing timely and efficient dues collections and ongoing communication with members, which is necessary for growth, come naturally to competent staff. They are quick to identify those who want to work as volunteers within the organization also, because staff are usually the first ones approached by an interested and energetic member.

Of any area in association management, membership administration and development is closest to the core of the organization and a competent staff instinctively understands members' needs and wishes. After all, they are in the 'trenches' on a daily basis, whereas board members usually deal with association issues sporadically.

Poor conference attendance

(Problem 4)

Knowledgeable staff members are essential for a successful conference. Initial budget preparation for committee and board review and approval is best handled by staff. They know the financial and attendance data from the last meeting, and can efficiently obtain information on venue costs and other program expenses. Staff can influence the program committee to take an entrepreneurial approach, without mis-directing the subject matter decisions. And staff are usually more attuned to the members' interests for an attractive meeting venue, because they think more in terms of marketing and membership satisfaction than the typical volunteer leader.

Meetings promotion is perhaps the best example of the value of competent staff, particularly in keeping the volunteer program committee committed to completing program preparation in time for effective marketing. Staff are also best at developing leads for industry support, although key leaders usually make more effective 'closers' as usually they are the major end-purchasers of industry products and can influence the corporate marketing departments. Staff members also are likely to take a longer view on the potential success of conferences than the leadership, and can help the board avoid making snap decisions. Volunteer leaders often expect quick and unrealistic success for new meetings, and do not recognize that it takes time for an annual conference to become established and develop a 'following'.

Lackluster publications

(Problem 5)

Competent staff are *always* concerned about the image of the association they represent, as they are professionally identified with the association they represent. They also have a better understanding of how to deal with printers and designers, and have the time to do so carefully. As with most areas of association management, the development of publication budgets is best handled by staff, as they are used to dealing with the financial issues of the association on a daily basis.

While staff may not be great copy writers, they generally accept their limitations well before a volunteer editor will admit to a deficiency. And they usually are willing to improve and learn, as it helps them in their own professional careers. And as far as keeping to production schedules, competent staff live by them every day. They know the administrative headaches that can occur when schedules are ignored. It impacts on them directly. And for reactions to reader comments, staff members live in the middle of this on a daily basis and have a customer service orientation.

How to create an effective staff structure

The most complete and permanent solution to all five problem areas, and others not dealt with in the preceding articles, is a *competent staff*.

So, how can the small and emerging association that is just keeping its head above water financially develop a staff structure, without the resources to hire the best full-time management and administrative talent and to establish a permanent association headquarters?

1) Establish a volunteer staff structure

One way is to establish a volunteer staff structure by identifying the most talented 'business' person on the board, which ideally should be the Secretary-Treasurer, and re-appoint him or her as the non-voting managing director. This selection is critical and must be made objectively; the worst thing that can happen is to pick the wrong person, as the association could suffer irreparable harm. The managing director then develops a team of competent non-board volunteers to act as staff, within the same general structure as a professional staff organization, reporting to him or her as the chief staff person. While the team members will not work together full-time or in the same office, they may have staff meetings occasionally and keep in touch by telephone and telefacsimile (*and email*) communication. If chosen carefully, each staff member will usually have access to some free, although limited, secretarial support within a practice, business or university. This approach can work if there is good co-operation and a willingness to let the managing director direct, and those selected for staff roles enjoy the 'shirt-sleeves' work necessary for successful association management. The managing director should handle general administration and finances, and act as association headquarters. The other volunteer staff members should each concentrate on a major functional area such as membership administration and development, publications, conferences, and research.

The problem with this approach is that members capable of assuming these tasks also have professional responsibilities that require attention and which often conflict with the priorities of running an association. And they usually have families that see too little of them anyway. If one or more functional centers fail to perform adequately, the managing director is faced with a difficult political decision. After all, these are volunteers and future leaders of the association who have other friends in the association who can influence the course of events. It is difficult to fire a volunteer for incompetence anyway, especially someone who is working for free! Also, by demonstrating competence as volunteer staff members, they are likely to become board members eventually and have to be replaced just when they have 'learned the job'.

2) Contract with an association management company

The second and most viable option for a small and emerging association to obtain an integrated and cost-effective full-time central administration, is to contract with an association management company that understands the needs of a growing association and which has a track record of helping other small associations develop successfully. A

professional association management company will use a ‘shared resources’ approach, and will charge only for the staff time used working for the client association. The association does not need to hire its own staff, rent space or buy or lease the expensive hi-tech equipment needed for cost-effective modern management. Because of the depth of its staff and their experiences solving these same problems for other associations, the company can provide the skilled management, development and administrative support the association needs to grow. Without detracting from the association’s uniqueness, it will gain greater visibility and a stronger identity. It will grow through increasing membership, accumulating financial reserves, presenting profitable conferences, publishing interesting newsletters and journals, and expanding membership programs. And not only will the association be able to pay for the contracted management services from the growth that will occur, compared with operating a small stand-alone association office – *it probably will cost less in the long run.*

Summary

1. All the problems discussed in the previous five articles in this series can be overcome with competent staff support.
2. There must be mutual respect for the roles of the board and the staff, and they must work together in a professional partnership. The board sets policy and the staff implements policy.
3. Good staff members know the organization better than most members and board leaders. Therefore, their knowledge of who the future leaders are, what members’ needs are being expressed, how to deal with critical financial issues, how to spruce up a dying publication, and how to attract more people to the annual meeting must be given careful consideration.
4. For small and emerging associations which need to break away from the relentless stagnation that develops when board members try to be both policy-setters and administrators, there are two options: delegate to a managing director and develop a volunteer staff; or contract with a professional association management company. The shared resources approach taken by an association management company, because of the depth of staff and association management experience, will usually produce better results quicker and be more cost-effective at the same time.

However an association meets its needs for staff support, it will only be as successful as the *quality* of its staff. The ‘staff decision’ is one of the most critical that must be made if an association is to become a growing organization serving an increasing number of members. A professional partnership between progressive association leaders and competent staff members will assure a successful future for any association that has a worthy mission and a viable potential membership.