

Please sit with strangers

**LEADERSHIP
AND
ADVOCACY
SUMMIT**
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Speed Dating: Successful Strategies for Making the Most of Your Leadership Term

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Learning Objectives

Participants will be able to:

1. List two tactics for overcoming association challenges;
2. Describe challenges to being an association leader; and
3. Discuss a variety of ideas from CO leaders for tackling association management.

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Directions

- Choose a partner (optimally someone you do not know, new partner each round) or do as a table.
- Introduce yourselves and share business cards.
- Come to an agreement on a topic of discussion (from the slide) – feel free to focus on one element of the topic or all of the included questions.
- You have 8 minutes total to discuss and get advice (I will tell you when 8 minutes are complete).

Round 1

- **Difficult Personality:** How should we handle a situation where a PA is working on his own legislation and potentially damaging relationships that are affecting progress of the constituent organization? “Rogue PA” sends out his own legislative updates to the old email list he kept on file from when he was an officer. He started an uprising on the last hearing of “the Bill the CO is supporting” and many PAs contacted their legislators directly opposing the bill. The chapter board has been discussing how to approach this.
- **Budget:** Our current bylaws do not establish much structure other than to say that the treasurer develops a yearly budget, committees submit budget requests yearly, and a vote is needed to pass the budget. We're concerned that we've been operating without a budget for a few years and now we need to develop one as soon as possible. How do we move forward?
- **Job Description:** I am reviewing our organization’s executive director job description and am curious about “the ideal job description.” Are there any sample ED job descriptions and what should it include?

Round 2

- **Membership:** Student membership numbers are high, then they graduate and the numbers drop off. They then come back as members after being a PA for 7 years. How do we keep the pipeline seamless?
- **Diversifying Revenue:** We want to diversify our revenue sources. We are looking into advertising in our newsletter and on our website – possibly selling merchandise. How should we diversify our finances and where do we start?
- **Board Leadership Performance:** The root of board performance problems often stem from a lack of clarity around commitments and expectations. What does success for our organization look like? What are the key behaviors and activities your leadership team must demonstrate to succeed?

Round 3

- **Board:** We have a goal of having new voices participate in our organization. We want to set term limits for board/house of delegates. How many terms can one be elected and how should we go about this change?
- **Code of Conduct:** I am trying to formulate a policy regarding disruptive Board members or Committee Chairs or members for the chapter. How should we write this policy? What advice do you have?
- **Finance:** Can any honoraria officers receive for speaking, etc. be addressed specifically to the CO itself? If so, then can we be reimbursed for things like travel costs, or for things an officer has already paid for like the articles of incorporation, etc.? I just want to make sure we are following all of the rules properly to avoid any IRS headaches. What is the policy on accepting honoraria as an officer of the board? What are some of the issues that you have run into with either state or federal regulations?

Round 4

- **Committee Structure:** Our legislative committee has gone through some changes recently (it used to operate under one – maybe two people). We are trying to take more of a committee role, with chair and members. Are there policies about who gets to speak for the association? What committee development guidelines or descriptions do you recommend?
- **Hiring Professional Expertise:** We need to hire XXX (ex. lobbyist, association management company, etc.) – now what?! What is the process? What percentage of budget do COs typically allow for lobbyists and management companies?

Round 5

- **Vendor Cancellation:** A conference vendor cancelled its table in our exhibit hall. What is the best practice for dealing with conference vendors cancelling? How late is too late? What do refunds look like?
- **Elections:** A member called and thinks there was an election violation. How to we address and respond to the inquiry? What should be our first few steps? After addressing the initial inquiry, what changes should we make in the future?
- **Free:** Didn't get what you need? Choose a topic!

Closing



