

Before You Say Yes...

An invitation to become an officer of an association that's close to your heart is hard to pass up, but have you really thought about what questions you'll need to answer before you accept (or decline) the offer?

By Paul J. Greeley Jr., CAE

Imagine that you have been an active volunteer in an association for the past 15 years. You've served on several committees during your time as a volunteer leader and have chaired two of those committees. Over the years, you've made your mark on the association: a volunteer who commits tirelessly to the industry, profession, or cause the organization represents. Clearly, you're an asset—and people notice it. Two years ago, you became a member of the board of directors.

One Monday morning, your phone rings. You answer, and on the other end of the phone is the chair of the association's nominating committee. He says he is calling on behalf of the association and hopes you will accept the committee's request that you make yourself available to become an officer of the association.

You're obviously flattered by such an offer, but there are other things in your life besides your volunteer work with the association. What about your own business? You work long hours and struggle to balance work and family life. Your volunteer role in the association has added to your workload, but you have been pleased with your involvement. You've learned a great deal from your peers in the industry, and the opportunities that the association affords you are worthwhile and fulfilling, both professionally and personally.

Like many people, time has become one of your most valuable assets, and you struggle to

allocate that time in a productive and profitable manner. So you initially tell the chair of the nominating committee that, while you're likely to accept his invitation, you would like to discuss it with your family and with your employees to see if they would support what would undoubtedly be a greater expenditure of your time on association matters. You tell the chair you'll call him back by the end of the week, and you ask him to e-mail you a list of specifications for the officer position so you can better judge your additional commitment.

Sound familiar? For many of you, the fictional scenario above may have rung exactly true. But I'll bet not many of us effected the sort of thoughtful consideration seen at the end of the story. Most of us, on receiving such a call, probably quickly accepted the opportunity to serve as an association officer without thinking it through. The first unspoken question we ask is, "Will this benefit my career and my sense of self-worth?" And the answer to that is an almost-automatic "yes." But what else do we need to consider before assuming a larger volunteer leadership role?

It is not always easy to find the right people to serve in leadership positions. All of us are busier than ever. Technology has made us subject to a virtual, 24/7 world. We are never out of touch, and the speed of communication seems to suggest that our work and volunteer efforts should be equally as speedy and numerous.

We also are deluged with continuing stories of board neglect and poor oversight in a number

of corporate and nonprofit organizations. We are aware of the increased scrutiny that is being aimed at the governing bodies of all organizations. New legislation such as Sarbanes-Oxley highlights and brings to public attention the fiduciary and governance responsibilities that all boards, nonprofits included, have. So when the call comes for us to step up and provide increased service to our trade or professional associations, we often pause to consider what is being asked of us.

Simple Questions Toward a Thoughtful Answer

There are many questions you must ask before assuming increased leadership responsibilities for a trade or professional association. Most important should be the realization that, as board members and officers of our organizations, we bear a great accountability to our trade or profession, to those who toil in that arena, to other nonprofit organizations, and to the public at large. Associations enjoy their tax-exempt status because of their commitment to the public good. When we are asked to step forward, we are clearly being asked to walk the talk of exceptional governance.

Let's look at some of the questions we should ask before accepting an officer position.

Can you afford it? In addition to what will clearly be a commitment of more time, there is also the likelihood of more out-of-pocket expenses as well. Board officers meet more frequently than directors do, and not all expenses are reimbursed by the association. In fact, some associations do not reimburse for anything, period. In addition, there will likely be the added expectation that you attend more of the organization's educational programs and regional conferences as a representative of the board.

Do you have the time? Are you willing to commit the additional time to participate—and at a level of output that befits a board officer? We have all

seen the members who accept an officer position, often with the noblest of intentions, but who fail to fulfill its requirements. Do you want to be painted with that brush?

Will accepting the offer bring hardship to your business or profession?

Are you willing to put in the extra time required to do both jobs—your “real” job as well as your board duties? We have all met the volunteer who works tirelessly for the association but who neglects his or her primary work or—worse still—family as a result. This is why it's critically important to receive buy-in from your personal “stakeholders,” in particular your primary employer and your family.

Are there any real or perceived conflicts of interest that might arise with this position? If so, are you able to accommodate those conflicts in a way that is appropriate? Are there issues within the organization for which you have a vested interest? Are there decisions being made that would benefit your company more than the industry or profession? Are you willing to look at the well-being of the industry or profession over the immediate benefits to your business or profession? Will you support the advocacy policies of the association, even though the results may not bring direct benefit to your own business?

Do you understand the fiduciary obligations you are accepting? Do you appreciate the duties of care, loyalty, and obedience that come with this position? Do you recognize the need to act with the best interests of the association at all times? Do you appreciate the need for loyalty to the decisions that the board makes? Are you willing to operate within the constraints of the organization's bylaws and articles of incorporation? If the answer to any of these questions is “no,” then “no thank you” should be your answer to the nominating committee's chair.

Are you willing to actively contribute to the improvement of the organization's ability to develop and sustain exceptional governance? Are you willing to operate within the frame-

work of the organization's culture and mores? Do you understand the uniqueness of the association? Are you willing to study and learn continually about methods and ways to improve the association and the way it delivers its experiences, products, and services? There is considerable literature available on board governance that all aspiring board members and officers should become familiar with. (See the “Resources” section on page 69 of this issue for some material to get you started.)

Are you willing to work in partnership with the association's chief staff executive, recognizing his or her responsibilities and authorities? Conflict between the board and the chief staff executive isn't always a bad thing. Indeed, much good can come out of “creative tension,” which often serves as a catalyst for innovation and growth. But if you don't have confidence in the chief staff executive, then your board service will be a waste, both for you and the organization.

Are you willing to help the board operate at a strategic level, always looking at the big picture for the organization? This goes hand in hand with the previous question. Will you recognize the responsibilities of the board and its officers to shape policy for the organization, while staying out of the day-to-day administrative activities? Will you respect the authority of the CEO to manage the staff? Will you accept that the CEO is an integral player in the governance of the organization as well?

Will you be open to providing thoughtful questions that probe the organization's direction? Will you accept questions asked of you that challenge your ideas and thoughts while maintaining an open mind on issues of importance to the association?

Will you recognize your responsibility to help ensure the fiscal strength of the association? If board members and officers do not lead and assist in the fiscal health of an organization, who will? Will you aggressively help the organization grow in members

and resources?

Will you encourage the board to be a “learning” board, devoting part of each meeting to some type of board improvement? Will you willingly and positively encourage the board to engage in thoughtful self-appraisal with the objective of providing continuous improvement to the governance efforts? Will you be honest and open as to your own performance on the board? Will you ensure that the chief staff executive has clear, understandable goals to accomplish, and will you participate in thoughtful and frank evaluations of his or her performance?

Will you assist in ensuring that there is a consistent effort to revitalize the board through the addition of new people to leadership roles? Are you willing to be a champion of new ideas, welcoming diverse, and sometimes counterintuitive, viewpoints that will ultimately aid innovation? Will you commit yourself to continually searching for new blood to bring in? And most important, will you know when it is time to let go and move on?

So, Should You Say Yes?

Hardly anyone is going to answer each of these questions—not to mention the questions within the questions—with an unqualified, ringing “yes.” But if you answered affirmatively to most of the questions, and you’re truly, passionately committed to the organization that receives so much of your volunteer time, you should accept the honor, privilege, and responsibility that come with being nominated as a board officer. Even if you haven’t yet received that phone call from the nominating committee, asking and answering these questions will prepare you for that day if it comes. And if you’re thinking about these issues and acting in a way that shows it, that day will come. **an**

Paul J. Greeley Jr., CAE, is president of the Association/Nonprofit Strategic Consulting Practice at The Signature Group, Vienna, Virginia. He is former chair of the Greater Washington Society of Asso-

ciation Executives and The Greater Washington Society of Association Executives Foundation and also is a presenter for ASAE & The Center for Association Leadership’s “Exceptional Governance” program. E-mail: pgreeley@paulgreeley.com