

HIT THE GROUND RUNNING – TIPS FOR THE INCOMING PRESIDENT

What Does It Mean?

- ✓ To begin your presidency with great energy, involvement and competence
- ✓ To immediately work very hard and successfully at your new position
- ✓ To be ready to work immediately on any and all new activities

People: Volunteers and Staff Make Up Your Team...

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 and staff who support your aims and term of leadership. 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.

(*Review the Governance Presentations for all of the members of your Board of Directors to become familiar with their job descriptions and responsibilities*) www.pcpcontario.org

Conduct an Orientation

Don't neglect Board orientation because you think the Board of Directors has heard it before. An orientation is a great opportunity to communicate goals, 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 provides time for getting to know each other and exchanging ideas.

The orientation is the time and place to carefully review the Board manual. Make sure that everyone understands the Centre's mission statement.

Inventory Committees

Committees are an essential work force in the Centre. 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.

(*Review the Governance Presentation, Additional Committees to become familiar with possible committees that you may work with*) www.pcpcontario.org

Build Staff Relations

The staff has the institutional knowledge for the Centre - 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 Centre, 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.

People Performance

Performance management is an ongoing process where the Supervisor (or Board) and the employee or volunteer work together to plan, monitor and review work objectives and goals and overall contribution to the Centre.

(*Review the Performance Management Tipsheets and Evaluation Forms for additional information on this very important procedure*) www.pcpcontario.org

Looking Inward

There are many unique traits that make up a great leader - no two leaders are the same!

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!

Some traits that might be common to leaders in non-profit organizations include:

- ✓ 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
- ✓ Good Delegator – you know you achieve more by asking for help, delegating projects and sharing the limelight, than trying to do it all yourself
- ✓ Enthusiastic – you've heard, enthusiasm is contagious; your enthusiasm will influence others to work for the Centre

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!

(*Review the Governance Presentation, Human Resources to learn additional tips for being a good listener and employer*) www.pcpcontario.org

Mission Statement

The most important description of the Centre should be described in the official Mission Statement. The mission should identify the organization, which it represents and what it offers.

It's Not About Popularity

While you may be the nicest person on the planet, when it comes to leading the Centre 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 people all the time; that's not your role. Leadership will require tough decisions, some of which that might upset some people - but remember, you're working for the future of the Centre, not trying to increase friends.

Making Tough Decisions

Be decisive and make tough decisions when necessary. Members, volunteers, staff and the Board of Directors will look to you for leadership – after all, that is why you were elected – to lead the Centre.

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

The well-balanced leader will gain support of their Board no matter what decision is made.

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 before the vote is taken.

Read the Communications

There are Presidents who understand the importance of communication, and those who don't. To be a President who understands the importance of communication, you need to:

- ✓ Thoroughly read every newsletter
- ✓ Be aware of the website and its content
- ✓ Carefully read meeting minutes - they are a legal record of your meetings and you want to be sure what occurred is accurately stated
- ✓ Plan to read staff and committee reports carefully

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 Centre 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 Centre.'

Planning...

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 their responsibility is to advance the Centre'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 the members, the Centre and the community.

Dust Off the Strategic Plan

The Centre 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 their 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.

If a plan does not exist 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 Centre.

(*Review the Governance Presentation, Strategic Planning for additional ideas and tips*)

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Performance Measures

There are many ways to measure performance. For example, consider these benchmarks and how your Centre 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 the budget is derived from fees, compared to non-fees?
- ✓ What percentage of the 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 Centre. A priority during your term is to have confidence that the Centre is comparable to or excels when measured against similar non-profits.

Calendar and Meetings

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

Watch out for holidays and other official 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

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.

The bylaws or adopted rules of order may prescribe agenda format.

(*Review the Governance Presentation, President for additional information regarding Meetings and Agendas and the President*) www.pcpcontario.org

Resources and Structure

Review Organizational Documents

The non-profit organization is guided by key documents. Many of them are legal, prescribed by provincial and federal government. Others are cultural 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.

- ✓ Board Manual
- ✓ Bylaws
- ✓ Article of Incorporation
- ✓ Mission Statement and/or Statement of Purpose
- ✓ Policies and Procedures
- ✓ Strategic Plan
- ✓ Budget and Financial Reports
- ✓ Marketing Plans
- ✓ Staff Job Descriptions
- ✓ Pending Contracts

The 'Play Book'

Most answers to leadership questions are found in the Board manual - your team should rely on it as if it was their 'play book'.

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 Centre because there is a section on policies.

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

(*Review the Governance Presentation, Board of Directors and Governance for additional information about the importance of the Board Manual*) www.pcpcontario.org

About Policies

A Centre adopts policies – an important role of the Board. Policies are the wisdom of prior Boards indicating how best to govern and manage the Centre. They help to interpret and frame the bylaws and articles of incorporation. They are found in the Board meeting minutes as motions.

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.

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.

(*Review the Governance Presentations, Treasurer, ABCs of Accounting and Keeping the Record Straight, Financial Management Handbook for additional financial information*)

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Inventory Risks

One role of the Board and the President is to protect the Centre. 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 it is called ‘risk management’. Discuss with staff if they feel there are any apparent risks. Ask the same of your Board members and family members. Your goal is to eliminate or minimize potential risks.

*All Governance Presentations and Tipsheets can be found at:

<http://www.pcpcontario.org/members>

*It is important for the President, and all Board members to review all Governance Presentations, Tipsheets and Handbooks in order to understand how the Board operates, and why it operates the way it does

Remember to check the PCPC website regularly for updated information that is important to you, your Centre and Board of Directors!

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