

Six Principles for Earning and Retaining a Seat at the Table

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Am I a player in my organization?

- Do I know what keeps my board members up at night?
- Do I understand the financial condition of my organization?
- If leadership is thinking about taking a public policy position, does anybody ask my advice?
- Does leadership share with me all the information I need to give them sound advice?
- Do I have a voice in the strategic planning process?
- When I raise concerns about something that could trigger a crisis, does leadership listen?
- If leadership learns of a crisis about to unfold, am I consulted immediately?
- Do new board members see me as a source of wisdom and good judgment?
- Does leadership consult with me before naming volunteers who may be working with me?

Principle 1. Know Everything You Can About Your Organization/Big

Picture (This is how you establish your credibility)

- Know the mission/reason for existing. If you don't know whom do you serve and why, how can you be an effective voice in helping to draft or revise the mission statement?
- Know how leadership perceives the organization. Proud of it, or believe it's in need of a turn-around?
- Who are your organization's key stakeholders and how do they perceive the organization? [members, visitors, donors, grantees] [Is it considered strong enough and focused enough to stand on its own or is it ripe for a merger? Is it perceived to be well-managed? Is it making good use of limited resources? Or is it perceived as a bloated bureaucracy duplicating the work of other organizations?]
- You can't give leadership worthwhile advice if you don't know how the organization is perceived by core constituencies.
- What are your organization's bottom line objectives and what are your primary sources of funding? How is it affected by cyclical changes in different sectors of the economy? If you don't know where the money is, you won't be able to advise them on what relationships to focus on.
- Who is the competition? [Essential for differentiating your own organization in the marketplace.]

- Know everything that's out in the public domain about your organization, especially financial filings with government agencies, web postings on sites such as Charity Navigator and Guidestar. Setting up Google News Alerts is a good idea.
- [THE MORE INSIGHT YOU CAN PROVIDE ABOUT YOUR ORGANIZATION AND WHERE IT STANDS RELATIVE TO COMPETITION, THE GREATER YOUR CREDIBILITY.]

Principle 2. Understand Your Board Members

[That car ride to the retreat may be the ultimate information gathering session; not to mention an opportunity to talk about how you be of assistance.]

- Learn everything about them that you can. (Even if you've never seen them, get to recognize their photos.) It's amazing how many board members – especially new ones – say nobody on the staff bothered to make them feel welcome.
- Time, Treasure, Talent [Recognize their talents. They love to be called on for help.]
- Strengths/weaknesses [This will give you more credibility when you make recommendations about who on the board should be tasked with what. Who should chair a fund-raising committee? Who should be selected for the strategic planning committee?]
- Time Famine [Always pressed for time. If you respect their time, they'll love you.]
- Which of their relationships can be leveraged? [Who knows whom?]
- Which relationships do they want to build? [Whom would they like to get to know? Introduce people at events. Nothing worse than staff huddling together while members feel ignored. Group people for photographs and then use the photos in your publication.
- Reputations to manage [They care about the reputation of the organization for its own sake. But they care about how the reputation of the organization reflects on their own reputations.]
- Concern with confidentiality [What's said in the board room stays in the board room.]

Principle 3. Take the Initiative/Demonstrate Leadership

- Build relationships before issues/needs arise [proverbial cup of coffee/lunch/ride to the retreat; welcoming e-mail. Send links to issues you know they care about. Subject line: FYI, in case you missed this. Sometimes a trade publication but also major dailies.]
- Don't be afraid to speak up.
- Identify opportunities [tell them about somebody they might want to know/recognize. Awards with strategic value.]
- Knowing when to give the heads up re: crises brewing or opportunities to be tapped
- Present Options with recommended choice
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Principle 4. Perfect Communications with Leadership/Board Members

- Oral and written communications ready for prime time
- Anticipate their questions [Whether written or oral: Downside and upside of what you're proposing.]
- [Written communications] Opportunity to demonstrate judgment through sound risk benefit analysis (strengths, weaknesses, opportunities, and threats) Draw on skills you use to pitch anybody (think about the audience first)
- What's the goal? (share information, win approval or support, persuade board member to stop doing something that's unhelpful to the organization?)
- Identify appropriate medium [e-mail subject line really needs to grab]
[Phone – Have you got a minute; this is why I'm calling or I'm calling about 3 things]
[Be prepared to get voice mail; have a bulleted message in your head or on a scrap of paper]
[formal presentation – rehearse; don't seem like you're flying by the seat of your pants)
- Know what not to be put in writing, as well as what not to say in a voicemail. [anything with the potential to embarrass you or your organization if it were shared unintentionally]
- Know when to say thank you [e-mail of praise with copies to other board members – but only if you mean it.]

Principle 5. Respect the Policy-Making Power of the Board

- Be persuasive and build alliances [If you're proposing something, have a sense of where you have support, and where you don't.]
- Defuse any sense of power struggle (“I'll go with whatever you decide”)
- Illustrate potential ramifications of decisions
- Accept adverse decisions with grace
- Don't burn bridges

Principle 6. Help Develop the Next Generation of Leaders and Find New Roles for Valued Leaders Who Have Completed Their Terms

- Term limits [Understand the By-laws]
- Identify and nurture new talent.[take them under your wing and offer your contacts.]
- Share with them your relationship-building techniques
- Help identify opportunities for involvement
- Retired board members = Kitchen Cabinet/Mentors

EARNING A SEAT AT THE TABLE IS A PROCESS – NOT A SINGLE EVENT. THE THING TO REMEMBER IS THAT IT'S A PROCESS BUILT ON RELATIONSHIPS WITH PEOPLE TO WHOM YOU DEMONSTRATE EACH DAY THAT YOU'RE TRUSTWORTHY, YOU HAVE SOMETHING WORTHWHILE TO OFFER, AND YOU KNOW WHAT YOU'RE DOING.