Transitioning to an ED

How YOUR Chorus Can Have an Administrator!

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Objectives

- Recognize how administrative staff increases efficiency and allows board members to focus on strategic issues.
- Know models of part-time administrative staff used in various choruses.
- Learn how to create or advance an administrative position in your chorus.

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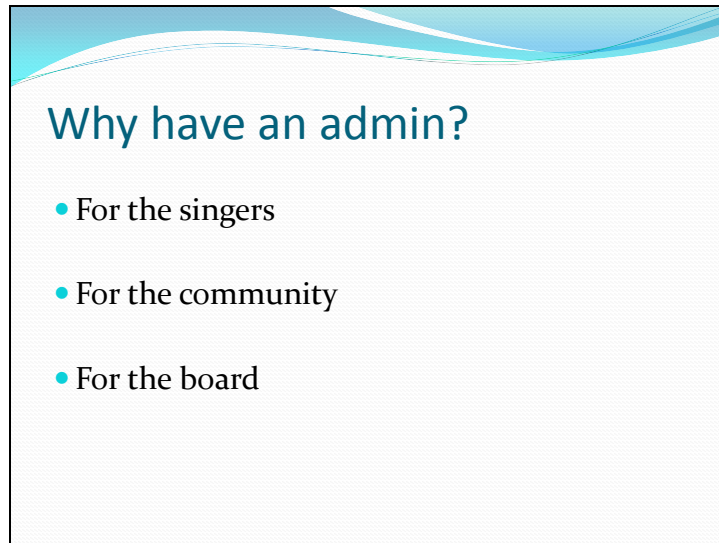
Slide 3

- Eve's Story

Slide 4

- Rusty's Story

Why have an admin?

- For the singers
- For the community
- For the board

- For the singers – they know who the one person is that can answer questions about how things get done in the chorus. Decisions about how music is distributed to singers, for example, are made from an organizational perspective, and the process doesn't change when one music librarian leaves and another comes along.
- For the community – there's one person taking phone calls, opening the mail, receiving email, etc. from the public. Response time is faster, bills don't go unpaid, etc. Leaders of other organizations know who the one person is to go to first, even if it's just to find out who else in the organization can answer their question or respond to their invitation.
- For the board – they get out of the business of running the chorus, transitioning (slowly, at first) from operating board to governing board – the one setting policy, making long-range plans, and ensuring the chorus has the resources (funds) it needs to be successful. Board members are recruited for their ability to serve as a public steward of the organization, not for their fantastic sewing skills and desire to make costumes for performances (for example).

What does an admin do?
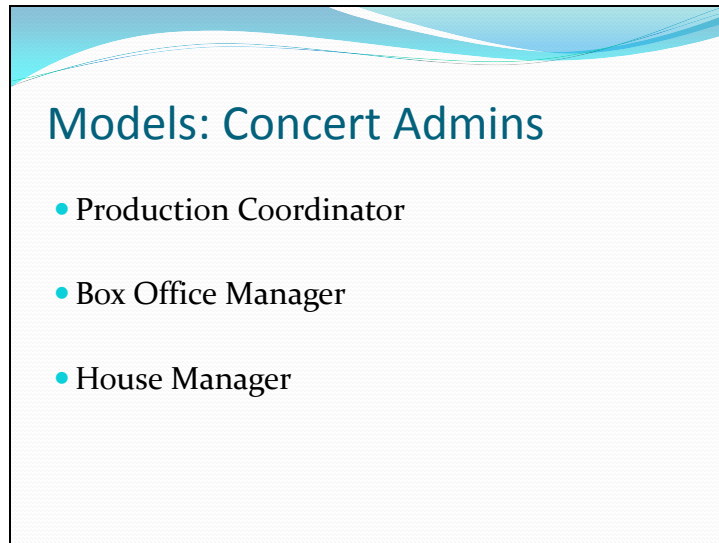
To answer that, answer these questions first:

- What's your goal?
- How can an admin help you reach that goal?
- What kind of support can you provide (salary/stipend, equipment, office space)?
- What's realistic for your group?

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Models of Chorus Admins

- Usual and customary for GALA and other community choruses
- Duties not "always" or "never"
- The title communicates an expectation
- The job description is more important than the title.
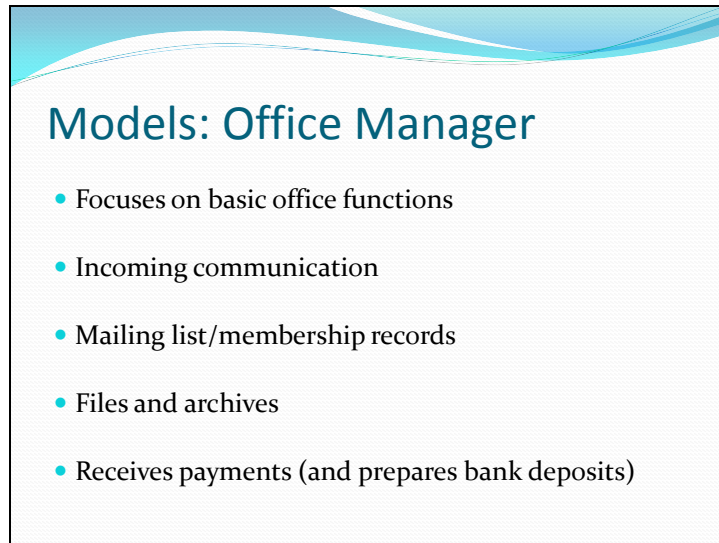- "Chorus Manager" works almost anywhere.

- Based largely on examples from GALA and other community choruses
- Duties for each model are not "always" or "never"
- The title of your admin position communicates a general expectation of the role to others; choose appropriately.
- Defining, agreeing to, and communicating the job description is more important than the title.
- The title "Chorus Manager" works almost anywhere.

Models: Concert Admins

- Production Coordinator
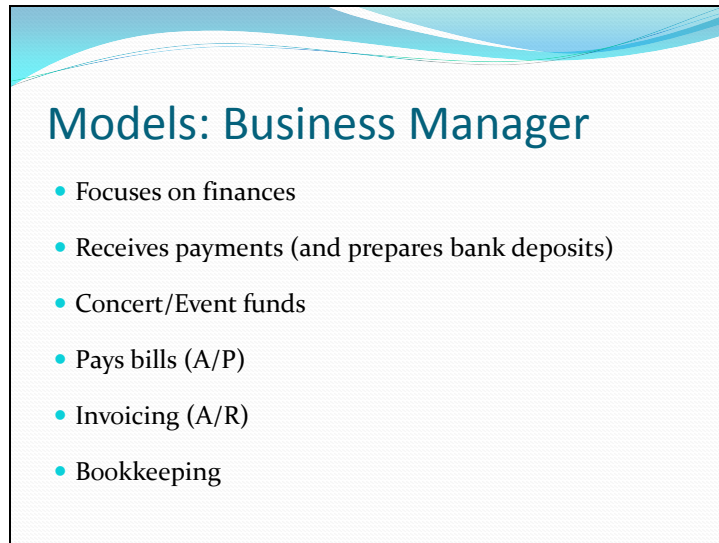
- Box Office Manager

- House Manager

- Production Coordinator—arranges for venues/tech needs, contracts with guest artists/musicians, coordinates concert program production/ad sales
- Box Office Manager—consigns tickets to singers, arranges for venue box office sales, receives and fills orders for pre-sales, prepares Will Call orders
- House Manager—recruits and trains concert lobby volunteers, handles on-site patron issues

Models: Office Manager

- Focuses on basic office functions

- Incoming communication

- Mailing list/membership records

- Files and archives

- Receives payments (and prepares bank deposits)

- This is the office secretary/receptionist
- Receives and forwards or replies to postal mail, telephone messages, and general inquiry email
- Maintains mailing list and membership records
- Organizes and files documents and archival items
- Accepts and logs payments from singers and customers; may prepare bank deposit

Models: Business Manager

- Focuses on finances
- Receives payments (and prepares bank deposits)
- Concert/Event funds
- Pays bills (A/P)
- Invoicing (A/R)
- Bookkeeping

- Focuses on finances (cash-handling, bookkeeping, bill paying, invoicing)
- Accepts and logs payments from singers and customers and/or prepares bank deposit
- Processes cash receipts from concerts/events
- Receives invoices, bills, and check requests and prepares for payment
- Tracks money owed to chorus and prepares invoices
- Makes entries in accounting system

Models: Operations Manager

- Focuses on "keeping the lights on"
- Secures supplies and equipment
- Office, rehearsal location, venues
- Calendar, email, databases, filing, storage
- Legal compliance

- Focuses on "keeping the lights on"
- Secures supplies and equipment needed for routine chorus functions (rehearsals, clerical, board meetings, etc.)
- Coordinates scheduling and booking for venues, events, and activities
- Coordinates, maintains, and/or uses systems for calendar, email, databases, filing, storage, etc.
- Completes and files applications and reports for legal compliance (permits, licenses, ASCAP/BMI reports, etc.)

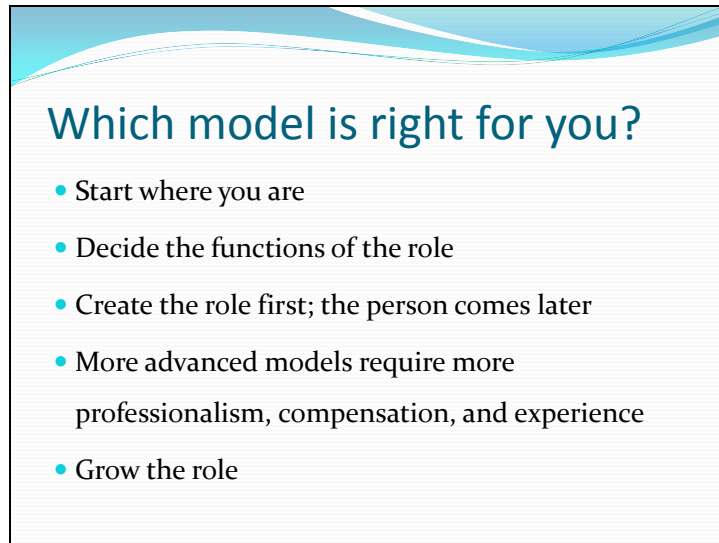## Models: General Manager or Managing Director

- Focuses on all administrative functions

- Office/Business/Operations Manager

- Works with a few (volunteer) staff

- Attends board meetings

- One of the chorus' public representatives

- COO
- Performs duties of Office Manager, Business Manager, and Operations Manager
- Recruits, supervises, and delegates to a few essential staff (often volunteers)
- Attends board meetings to report on and represent administrative functions
- Supplements board president and artistic director as public representative of the chorus

Models: Executive Director

- Focuses on big-picture aspects of chorus management
- Minimal board input
- Generates ideas and delegates tasks
- *Ex officio* board member
- Networking, fundraising, planning, and policy
- Primary chorus public representative

- CEO
- Runs the organization with minimal input from the board
- Generates ideas; delegates tasks to other staff and/or volunteers
- Attends and participates in board meetings as board member peer/partner (usually non-voting/*ex officio*)
- Works closely with board on networking, fundraising, planning, and policy
- Supersedes board president and artistic director as chorus spokesperson
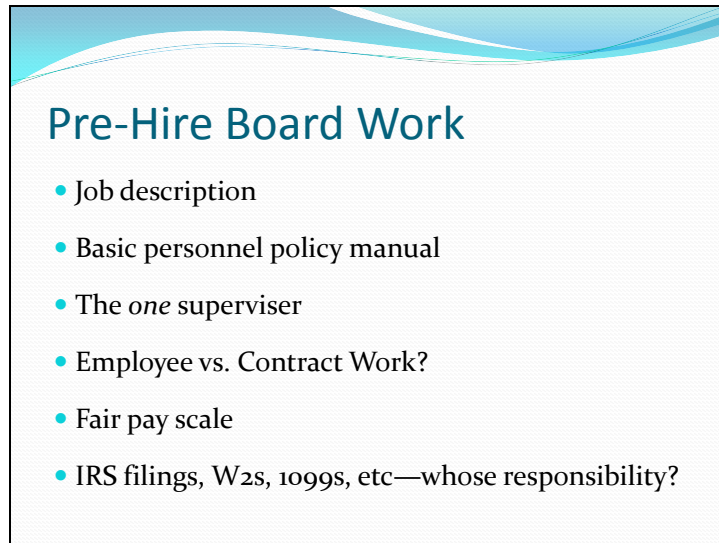
Which model is right for you?

- Start where you are
- Decide the functions of the role
- Create the role first; the person comes later
- More advanced models require more professionalism, compensation, and experience
- Grow the role

- Start where you are—consider your group's experience having admin staff
- Decide what functions that role could perform that are most helpful to your chorus, AD, and board members
- Create the role and then find the person…but if you only have one good candidate, create the role around his/her strengths
- More advanced admin models require more professional working environments, more compensation, and (important!) more experience
- Transition the role to more advanced models as appropriate

What do you need to hire your first employee?

- Feels like A LOT
- Easy and quick to set up
- Make it a priority
- New employee can do some of the set up
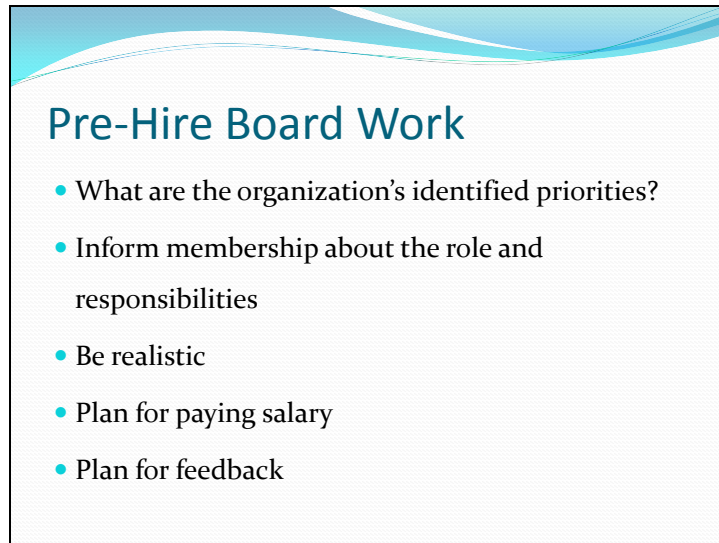- Have money or donations in place

- Feels like A LOT, and it is and it isn't.
- Most is easily accomplished and set up fairly quickly.
- Once you decide hiring a staff person is a priority it will become reality.
- New employee can set up some of items like opening business accounts, purchasing and/or setting up computers, etc.
- Make sure to have money or donations in place so the employee can actually do the job.

Pre-Hire Board Work

- Job description
- Basic personnel policy manual
- The *one* superviser
- Employee vs. Contract Work?
- Fair pay scale
- IRS filings, W2s, 1099s, etc—whose responsibility?

- Job description (keep it simple!)
- Basic, simple, personnel policy manual (don't recreate the wheel…there are samples through the Center of Nonprofit Management)
- Decide the one person who will supervise the employee
- Check your state's employment rules and regulations: Employee vs. Contract Work?
- Be fair in your pay scale when considering the question of Employee vs. Contract worker
- Identify who is going to keep track of the IRS filings, W2s, 1099s, etc? KNOW what is required.

Pre-Hire Board Work

- What are the organization's identified priorities?
- Inform membership about the role and responsibilities
- Be realistic
- Plan for paying salary
- Plan for feedback

- Look at the organization's identified priorities and focus your employee on work that supports the mission.
- Communicate the role and responsibilities clearly to your membership so singers understand who gives the employee direction and to whom the employee reports.
- Be realistic about how much a new person can take on and how quickly the person can learn the organization.
- Have a plan to pay the employee on a regular basis and be timely: Who writes the paycheck? Delivers the paycheck?
- PLAN to give lots of positive feedback and PLAN to turn inevitable mistakes into learning opportunities.

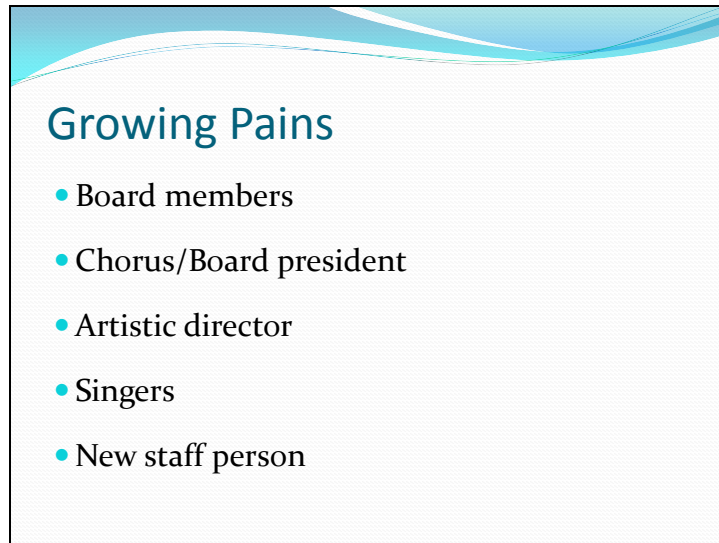## Realistic Job Description

- Hours and salary vs. deliverables

- Expectations and review process

- The employee reports to ONE person

- Perks and vacation time

- Fair and reasonable job description

- Consider the number of hours and amount of salary when deciding the deliverables
- Clear expectations with a built in review process
- Clearly spelled out lines of command: Who is the ONE person to whom the employee reports?
- Perks and vacation time
- Be fair and reasonable in the first job description

Tools to Allow the Employee to Do the Job

- Real work space...not someone's home
- Computer, printer, scanner, Internet access, etc.
- Desk and chair
- Business email account/phone line
- Business mailing address and/or post office box
- Space and equipment for filing

- If at all possible have a real work space...not someone's home
- Up-to-date and functioning computer, printer, scanner, Internet access, etc.
- A real desk and a comfortable, decent chair
- Business email account
- Business phone line
- Business mailing address and/or post office box
- Space and equipment for filing

Growing Pains

- Board members
- Chorus/Board president
- Artistic director
- Singers
- New staff person

- Board members – uncomfortable giving up day to day operations AND now need to perform the duties of a governing board
- Chorus/Board president – now has to share authority and the "spotlight"
- Artistic director – may treat the new staff member as personal assistant
- Singers – may balk at new policies and procedures created by the new staff person
- New staff person – may feel the need to "do it all" to prove her/his worth

- Advice from the trenches

- Your questions

- Support from GALA Choruses:
    - GALA-VolManagers Google group
    - GALA Managers & Directors Retreat

- More questions/Want the presentation?
    - Eve—evecampbell@att.net
    - Rusty—rusty@tooleymail.com