“Pains” of Transition – Position for Future Growth
Who We Are

• >2000 members
• 12 member EC
• 8 year rotation
• 3 staff positions
  • Executive Administrator
  • 2 Office Assistants
Houston – We have a PROBLEM!

How did we solve our problem?

What we learned
Background

• 10 years with experienced Exec. Admin
  • Strong financials
  • Well established procedures
  • Didn’t require much oversight
• 2016 – Promoted internally for new E.A.
  • Had worked with OWEA for 5 years
  • Hired two office assistants
Discovery – Mid 2017

• List of outstanding bills increasing
• Struggle to get updated P&Ls
• Defining event 8/2017
  • Contact hour issue with OEPA
  • Immediate termination of EA
The Problem Was Much Bigger

- Contact hours recordkeeping issues had potential to impact licenses of over 600 operators
- Large amount of unpaid bills – and increased as we began to review
- Limited financial records in 2016 and 2017
- Our balance was shrinking
  - Outstanding bills
  - Decisions based on previous balances
- Lack of confidence in central office
Plugging the Leaks

- Temporary admin staff hired
- Began responding / working with OEPA on contact hour issue
- Began rebuilding financial records
  - Paid outstanding bills
- Business as usual on events and member services
- EC members volunteered a lot of time!
- Remaining OWEA staff carried on with business
Our Search for a New E.A.

• Advertisement
  • WEF Website
  • Ohio Association of Non-Profit Organizations (OANO)
  • Association of Fundraising Professionals (AFP)
  • Additional option: American Society of Association Executives (ASAE)

• 25+ Resumes

• Shortlist and interview by President, President-Elect and Vice President
# Candidate Review Criteria

<table>
<thead>
<tr>
<th>Salary Expectations ($K)</th>
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<tbody>
<tr>
<td>Non-Profit Management***</td>
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<tr>
<td>Non-Profit Law/Finance***</td>
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<tr>
<td>Quickbooks / Accounting</td>
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<td>Training / Recordkeeping</td>
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<td>Social Media</td>
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<td>Membership</td>
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<td>Employee Management</td>
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<td>Event/Meetings Coordination</td>
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<tr>
<td>Can be a “voice” of OWEA</td>
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Previous non-profit experience is key.

Wastewater experience was NOT!
The End of the Storm

• 1/2018 – hired new E.A.
• 2/2018 – final resolution of contact hours with OEPA
• 3/2018 – completed accounting overhaul
Lessons Learned

• If something seems off it probably is
• Even when things are good, oversight is prudent
• Training / involvement of EC in key areas of organization key (membership, finances, contact hours)
• Procedures can always be improved – do this while things are good
• An abrupt change and problem can lead to opportunity
• Non-profit experience of your lead staff is important
Onward and Upward

- New EA with a strong association background
- Refinement of Contact Hour process, including updates to written SOP
- Increased financial transparency
  - Monthly 3\textsuperscript{rd} party review
- Developing revised EC member duties (P&Ps)
  - Training / involvement in membership, contact hours, finance
- Re-branding – late 2017
thank you