

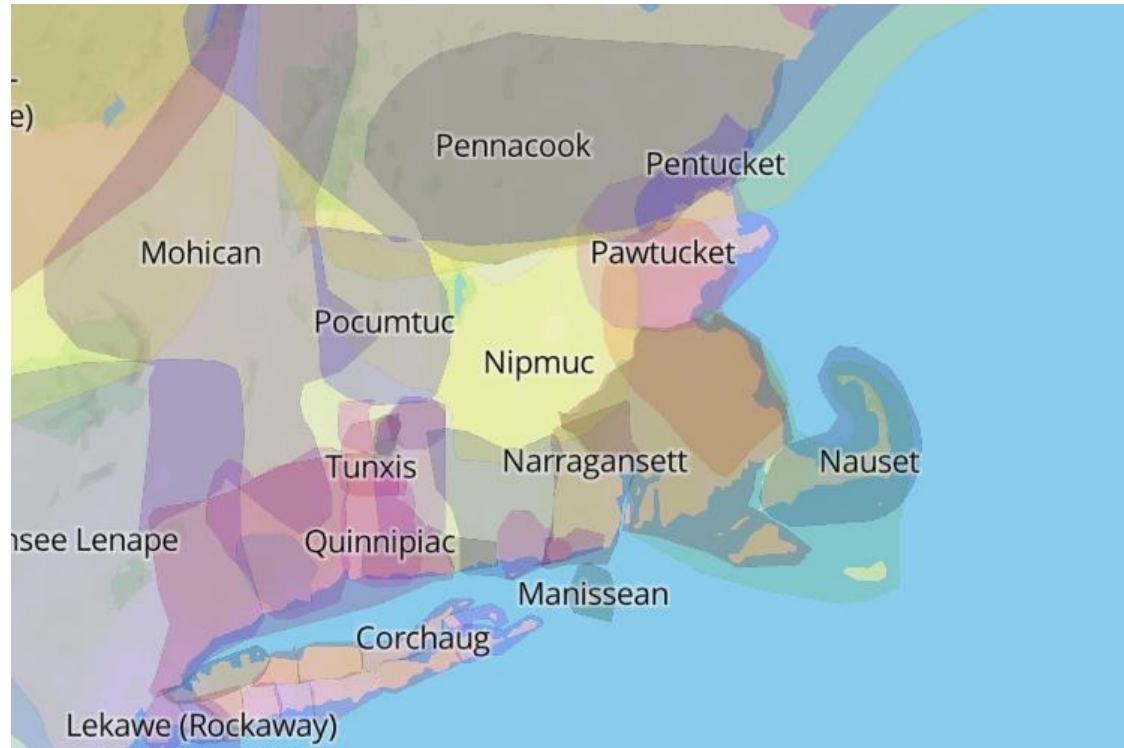


Other Duties as Assigned:

The Varied and Various Roles of a New Executive Director

NEMA Executive Director Community of Practice





Source: native-land.ca

EDCOP Presenters

Eric Peterson, Executive Director of Metropolitan Waterworks Museum in Chestnut Hill, MA
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Deanna Witte-Walker, Executive Director of Southold Historical Museum in Southold, NY
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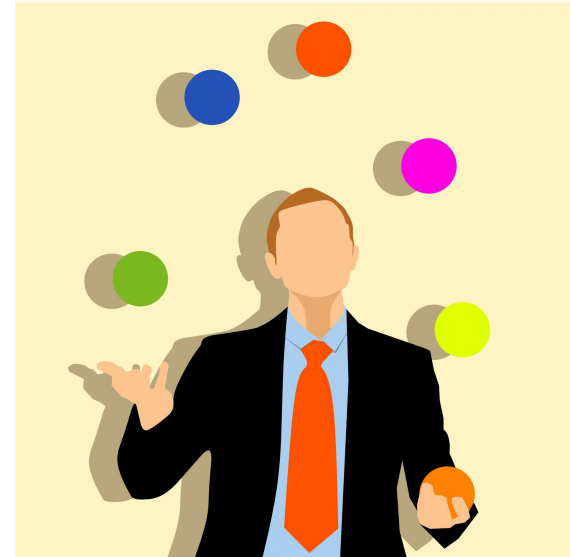
Kaleigh Paré Shaughnessy, Executive Director of Whittier Birthplace in Haverhill, MA
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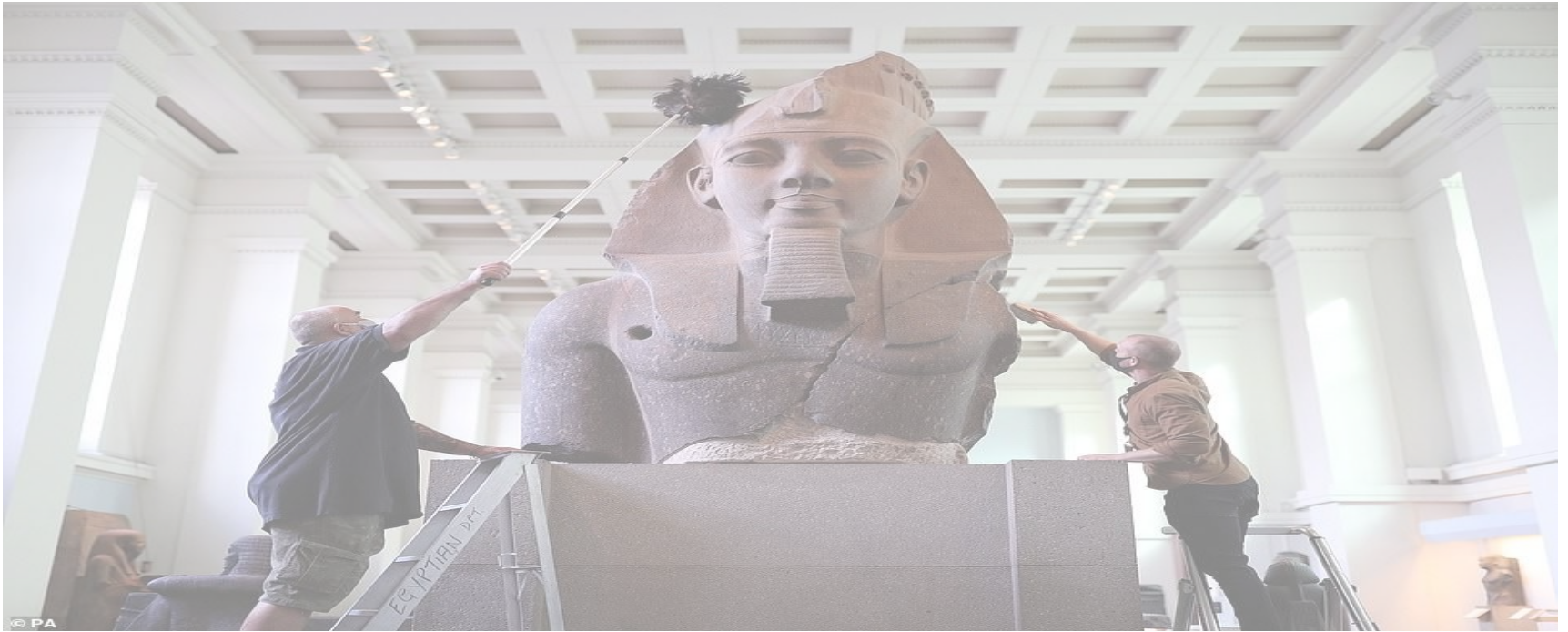
Topics We'll Cover:

Managing Facilities
Working with Boards
Conquering Finances
Directing People

Considerations Across All Topics

- Size of museum
- Promoted from within vs. joining from outside
- Transition time between directors (or even being an org's first director)
- Be flexible
- Be (and act!) confident
- Know your job description
- Set your boundaries
- Manage your own and others' expectations





Managing Facilities

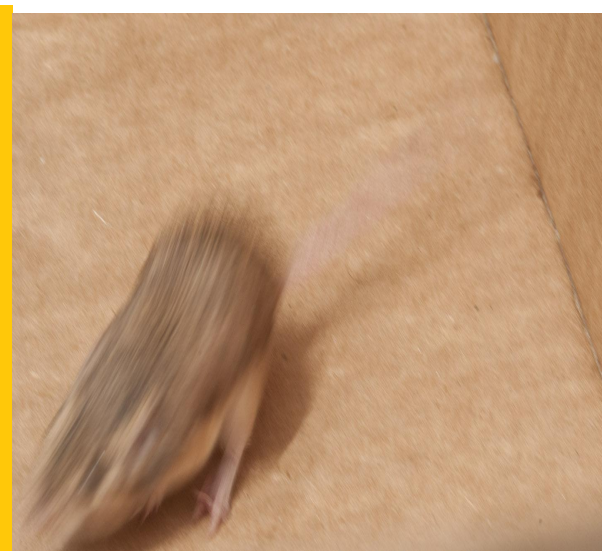
Eric Peterson



- Museum Access & Security
- Maintaining IT Infrastructure



- Office Management
- Purchasing
- Contractor Supervision

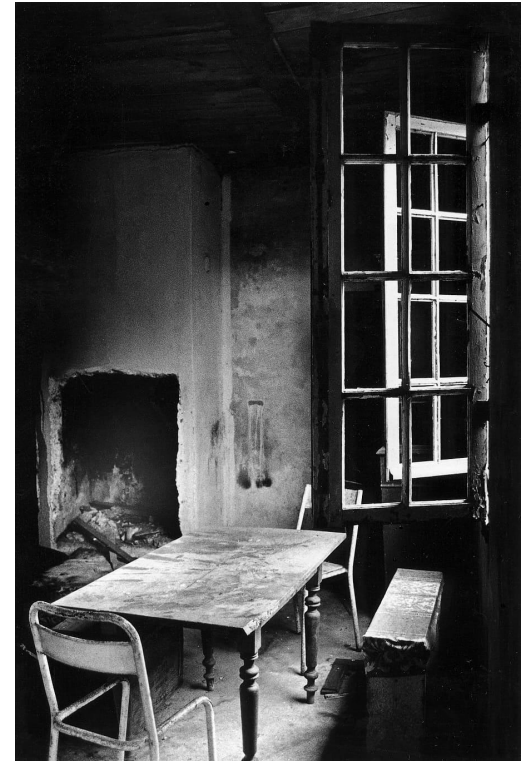


- Facility- Related Decision Making

Crisis Management

Eric Peterson





WORKING WITH BOARDS

The Board's Role

- Duties of care, loyalty & obedience
- Set policy
- Be ambassadors



The Director/CEO's Role



- Operationalize the policies of board
- Stay mission focused
- Be the face of museum

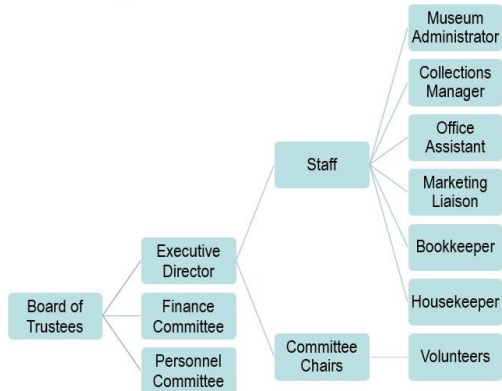
Special Relationship with Board President

- What are your expectations?
What are the president's?
- Review expectations periodically.
- President represents board.



Chain of Command Concerns

Southold Historical Museum Organization Chart



- Board member - staff communication
- I.e. Head of personnel committee
- Board asking personal favors

Gaining the support of the board

- Communication, communication, communication.
- Be prepared. Better to be a try hard than to be unprepared.
- You are learning as you go along.
- Find a comfortable way to say you don't know the answer but will try to find out.
- Better to admit that you don't know than bluff.
- Mutual respect



Conquering Finances

Accounting

- Policies & Procedures
- Separation of Duties
- Reading and understanding your 990
- 1099s, W9s, oh my!
- Fiscal Year Calendar



Remember: The IRS has certain rules for document retention related to financial documents including payroll and 990s.

Bookkeeping

- Finding the right software
 - Make sure your systems (online payment processor, POS, etc.) talk to each other!
- Invoicing
- Accounts payable
- Reconciliation
- Chart of Accounts



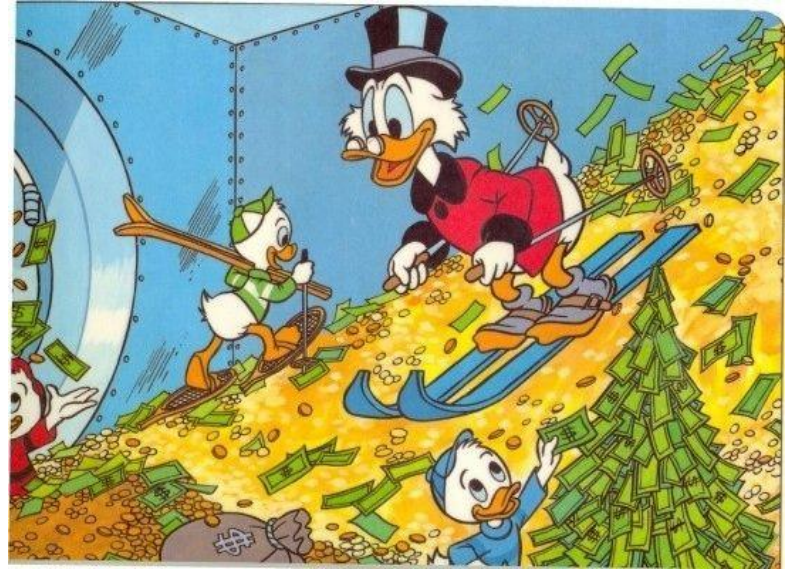
Budgeting

- Start early
- Involve as many people as possible
 - Staff, Board, committees
- Do your best to budget for major projects and/or program restricted funds (grants)
- Staff salaries
 - COLA, set by IRS
- Write an addendum, if necessary, when presenting to the Board for approval



Understanding Your Finances

- Cash Flow
- Cash Reserves
- Endowment/Investment Policies
- Relationship with bank
- Who does the fundraising? ED vs. Board vs. Staff
- Annual Report
- Revenue breakdowns
- Know your talking points!





Directing People

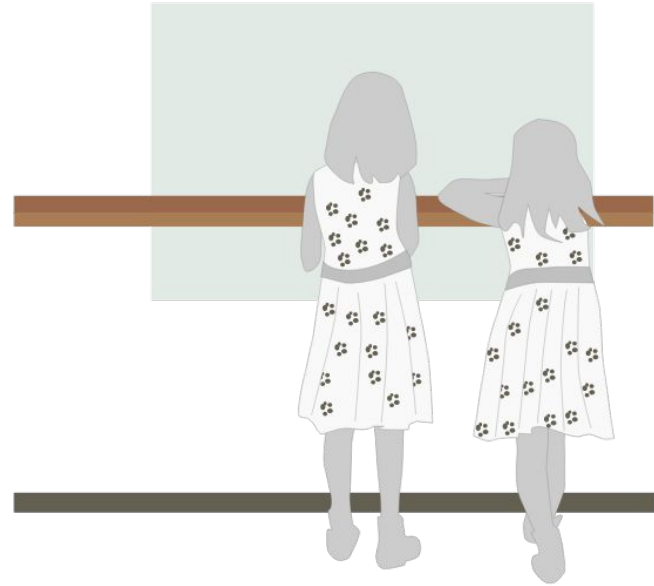
Volunteers

- Why do people volunteer?
- Recruitment of volunteers
- Managing volunteers' projects
- Keeping volunteers happy
- Board members are volunteers too



Visitors

- Managing visitor expectations
- Safety of visitors and safety from visitors



Staff

- Onboarding & offboarding
- HR overview
- Delegating / teamwork
- Setting & meeting goals





Wrapping Up...

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