

Mixed Messages

Can a CEO follow the board and lead the staff in two directions?

Underneath Medicare paperwork and client case files, amid personnel forms and Post-It notes, was a binder labeled “Strategic Plan 1998-2001.” Irving Lamott, chief executive of the Grove City Senior Center, often noticed it on his cluttered desk when he was searching for something else. Today he was looking for his notes for tomorrow’s board meeting...

At the board meeting

“Irving, your budget looks great,” began Alex Vail, the senior center’s board chair. “You’re on target financially. You’ve maintained the number of clients you’re serving. Client satisfaction seems to be high. But I thought we were supposed to be growing. In our strategic plan we talked about expanding into an overnight program. I know you’ve said there’s a sizable waiting list. Have we looked into acquiring a larger facility?”

Bert and the other board members looked expectantly at Irving. After six months of brainstorming and planning, a day-long workshop with a consultant, and exhaustive review, the board had finally completed the center’s strategic plan a year ago. At the first few board meetings since the plan was approved, Irving told the board that he was gradually introducing it to the staff, because he didn’t want to overload their already full plates. The board accepted this, especially as Irving reassured them that he was 100 percent behind the plan and had been an active participant in the planning process. He had done some research on other daytime care facilities for older adults throughout the state and had come back with a number of projects he wanted to emulate.

Yet, a year later, the center did not appear to be reaching its potential. In an environment with a rapidly increasing demand for services for seniors, Grove City was running in place.

“Why isn’t anything happening, Irv?” asked board member Susan Chin, as gently as she could.

“Give it a little more time,” Irving said, in what board members recognized as a familiar refrain. “My staff works hard. They put in long hours to ensure these folks have a good quality of life. I’ll try to introduce some of our ideas, but I am afraid they’ll be overwhelmed by even the thought of more work. They already give me everything they’ve got.”

At the next staff meeting

“As you know, I met with the board last week,” Irving said to the senior staff assembled around the table, “and they’re really pleased with the work you all have been doing. They were impressed that we’ve

kept within our budget and that we’ve maintained such a good standard of care for our clients.”

Staff members smiled at the compliment. They had been working *hard* and were pleased someone had noticed.

They also brought up a few questions about our future and how we might better take advantage of some opportunities,” Irving continued. At this, some of the staff looked quizzically at him. They had to work so hard to keep up with the present that any mention of the future made them suspicious.

“For example, it’s great that we’re at maximum capacity here, but perhaps we should look into innovative ways to serve the folks on our waiting list,” Irving ventured.

“There are 100 people on our waiting list,” said Maria Ruiz, director of admissions at the center. “We don’t have enough openings to serve that many people. We don’t want to crowd them. They have to wait. That’s in the report I wrote for the board.”

“If we had another building and 10 more staff people, we could accommodate them,” said Erik Henson, director of activities, “but we don’t.” He looked doubtfully at Irving.

I know we don’t now, but we could,” said Irving. “This center started out in someone’s house, remember? We had to get a new building once, and we could certainly expand again. The board suggested in the strategic plan,” he said, as he opened up the notebook and began riffling through to find the page he was looking for, “that we could increase our number of clients by 150 percent in the next three years because of the demand. We can do that.”

“Let’s get the board to serve meals while we figure out how to bring a hundred more people in here,” said another staff member.

“All this takes money,” said Lucy Jackson. As the one-person development department at the center, Lucy had her hands full.

Irving remembered why he hadn’t brought these issues up before. The staff was overworked. The board’s vision was good, but the staff didn’t share it. Irving wondered about himself. Running the center was a big job, and he balked at the prospect of making it bigger.

BUSINESS VOLUNTEERS UNLIMITED
Discussion Points for Case Study Facilitators

Mixed Messages

Grove City Senior Center
Chief Executive: Irving Lamott
Board Chair: Alex Vail

1) Discussion Question: What was wrong with the strategic plan?

- a) Apparently, the senior staff (other than the chief executive) was not involved in the strategic planning process. Their expertise would have been useful -- regarding client needs, present capacity of the organization, and resources needed for expansion.
- b) The plan might have looked good, and maybe it involved plenty of board time as well as a consultant, but clearly the plan failed to include a strategy to develop the resources to expand capacity. Without a financial/budget plan, and strategy to build the revenues, the plan cannot be implemented. Furthermore, in order to develop needed resources for expansion, Grove City Senior Center might need additional staffing for development, and definitely needs a plan for board leadership and involvement in the development campaign.

2) Discussion Question: What should Irving (chief executive) do?

- a) He needs to go back to his board -- discussing this first with his board chair -- and explain that the strategic plan is missing the financial and fund raising plan, and that these plans need to be developed (with expert consulting input) in order to facilitate the achievement of the expansion.
- b) He needs to involve his senior staff in any further planning.