

## 2007 National Society of Genetic Counselors Presidential Address: Embracing Change to Race Forward

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Thank you for this tremendous opportunity to serve as your president in 2008. As you might imagine, this is somewhat of a daunting task. However, if, as Dale Carnegie said, “Flaming enthusiasm, backed by horse sense and persistence, is the quality that most frequently makes for success,” then you are in good hands. Like so many of you, I am passionate about our profession, and this passion has only been fueled by my professional and volunteer experiences. I truly believe that we are valuable members of the healthcare team, that we help our patients make better, informed choices that improve their quality of life and health, and that we deserve to get paid for our services. My overarching goal over the next year is to get others, such as physicians, allied health professionals, legislators, insurers, patients, and advocacy groups to believe this as well.

So how do we, as an organization, work towards achieving the recognition we would like and that we need to grow and thrive as a profession? And how do we do this within the confines of the available resources? We start by prioritizing goals, based on what you, our members, tell us are the most important issues to address. Do you remember all those surveys we emailed to you this year? We actually read those. We value the information you provide because it

gives us the broad perspective required for informed prioritization and it helps us be responsive to your needs. We also evaluate external forces, such as advances in technology and changes in delivery of healthcare services, to determine what impact they might have in our ability to reach identified goals. Based on this information, we develop a strategic plan which lays out what it is we want to achieve in a set period of time. You have already heard a detailed account of NSGC’s strategic initiatives for 2007–2009.

There are a few components that are critical to the success of a strategic plan. First, it is important to set realistic goals—ones that can be met in the context of finite financial, staff and volunteer resources. Second, it is important to have measurable objectives to evaluate whether the goals are being met. Finally, it is critical to have the infrastructure in place to do the work that is needed to meet the goals as completely, but also efficiently and cost-effectively as possible.

NSGC has taken part in strategic planning for years. As a board member in various roles, I have personally participated in developing the last three. The Board has always done an outstanding job identifying critical goals and has gotten better at setting realistic ones that have measurable objectives. However, over the last several years, it became increasingly apparent that our infrastructure—our staffing model and board structure—needed attention. What had worked so well in the past, when we were a small, relatively new organization, was now hindering our progress.

Let me give you an example from my personal experience. My first board position was as the Region III representative. Before I even attended my first board meeting or board orientation, I was asked to develop my annual objectives and budget. I did not have any information about NSGC’s strategic plan (and quite frankly, would not

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have even known what a strategic plan was!) or the organization's goals for the year. All I knew was that as a Region Representative I needed to develop a newsletter, plan a regional conference, and attend board meetings. As a result, my objectives were primarily focused on my regional activities rather than NSGC's strategic initiatives. Furthermore, these activities required a significant amount of time and energy which reduced the amount of time I had to devote to thinking about NSGC's big picture, outside of participating in Board meetings.

The situation was somewhat similar when I was appointed Communications Committee chair. Once again, I was asked to develop objectives and a budget for the committee before my first Board meeting at the Annual Education Conference. This time I had the benefit of previous board experience (I knew what a strategic plan was) and I had experience as a committee member. However, in the spring of my first year as chair, NSGC developed its new strategic plan, as scheduled. This plan established new objectives for my committee, many of which were very different from the ones I developed myself and none of which I had specifically budgeted for. Nor were the new objectives the ones I had discussed with those volunteers who came to the Communications Committee meeting at the AEC. Based on these experiences, I began to appreciate that perhaps there was a more efficient way for the Board and staff to operate.

Clearly, I was not the only person having these thoughts. In fact, in 2005, under the leadership of President Kelly Ormond, the NSGC board undertook a major evaluation of several aspects of governance including changing the board structure. There were several reasons for considering such changes. In particular, the board realized that it needed to be more responsive to the membership and that the responses needed to be well thought out yet generated quickly. The board also recognized the need to create less operational board member roles. If board members are primarily responsible for tasks such as planning a regional meeting or doing committee work—i.e., the operations of an organization—then they have less time to work on setting the organization's direction (strategizing) which should be the real work of the board. Finally, the board realized that it needed to improve communication, between current board members, between outgoing and incoming board members, and between the board and the membership.

As an initial step, the board held a facilitated meeting in February 2005 during which the structure and function of the NSGC governance system were evaluated. Next, a task force was convened to make recommendations based on the outcome of the facilitated discussions. Finally, the task force brought its recommendations before the board in June 2005 for further discussion and vote. This process resulted in several changes. Board terms were extended from two to three years, for all but the presidential rotation, with

staggered terms so that no more than 1/3rd of the board would roll off at one time, to improve historical perspective. Terms were changed to run from January–December, rather than from AEC to AEC, to give newly elected/appointed board members a chance to take part in a board meeting at the AEC before they were responsible for making decisions as a board member. A plan for improving internal and external communication was developed and given a vote of confidence from the board. However, one recommended change, a change in board structure that would remove committee chairs from the board and reduce the number of board members, was not approved.

Personally, at that time, I was not sure that changing the make-up of the board was necessary. I believed that the changes that had been approved would help us to reach the goals of increased responsiveness, improved communication, and less operational board roles. I was comfortable with the plan to revisit the issue of structural changes once the approved changes and communication plan had been implemented.

The board was in the midst of implementing these changes when our executive office transitioned to SmithBucklin. After the dust settled and the major aspects of the transition were behind us, again the issue of governance and board structure came under scrutiny. In fact, during our strategic planning process, the issue of governance was determined to be so important that it became part of one of our strategic initiatives. That is why, under the leadership of Cathy Wicklund, the board re-evaluated NSGC's governance structure, looking critically at the board structure and how the board and executive office were working together. So in February 2007 we had a facilitated board session on governance.

It was at this session that I really came to understand why it was time for NSGC to change. First, our facilitator clarified that the role of the board is to set direction and the role of the executive office role is to figure out how to implement the board's vision using available volunteer and staff resources. Having committee chairs, who by virtue of their position are really involved with the implementation—the "how" to make it happen—, makes it more difficult for the whole board to focus on direction. Having regional representatives can be problematic because each is only elected by a small portion of the membership. Furthermore, their role is blurred—are they on the board to represent regional interests or are they there to help determine the direction of the organization as a whole? But these issues aside, the biggest "light bulb" moment for me occurred when the facilitator asked us to do an exercise that involved identifying who was responsible for which organizational activities. Individually and as a group, for a majority of the activities, we did not know who was responsible. How can we operate efficiently without having better role identifica-

tion? How is our current structure hindering our ability to define our roles? I recognized that although we were doing okay with our current governance structure, with change we could potentially be much more effective. Furthermore, I strongly believed that to achieve what you, our members, were asking us to achieve, we needed to make these changes now.

The board's consensus at the end of the meeting was that it was time to consider additional governance changes. Cathy Wicklund convened a governance task force to take the information gleaned from the facilitated meeting and turn it into a new governance plan. The task force was specifically charged with evaluating all aspects of governance including board structure, board and staff roles and responsibilities, election procedures, term lengths, and leadership pipeline. After a face-to-face meeting and several conference calls, the task force made recommendations to the board. The board vetted the recommendations and after many discussions, the plan that you have heard presented was approved.

I wanted to share my perspective on NSGC's governance history with you for one reason. I realize that the proposed governance structure represents a dramatic change. This change comes at a time when we already have undergone a major transition in terms of our executive office staffing. But I hope that you realize from my story, that like me, no one took the proposed changes lightly. Every board member critically reviewed the pros and cons of the new governance structure. Although we were told early on that the proposed changes represented "best practices" for organizations similar to NSGC's in size and age, we all wanted to make sure that they fit what was best for NSGC. Also, rest assured that we are not done evaluating our governance structure. The next crucial step is evaluating if and how the changes we have made are working. We will do this internally, but we will also reach out to you, the membership, for your feedback.

Every board and staff member realizes that NSGC has a tremendous resource—our volunteer members. We do not want to lose that resource. What we really want is to enhance your volunteer experience, grow our leadership pipeline, and be an organization that can act and react quickly. I envision an organization where the skills and interests of volunteers are matched with projects and tasks, where being a committee member means that you are given a specific task to do and a timeline within which to do it, where being a volunteer is such an amazing experience that there are multiple nominations submitted for each board position, and where the make-up of the board in any given year is determined based on the collective skills set of all board members not just single members. I believe we have established a structure that will make these aspirations become a reality. I hope you will join the board in embracing

these changes while taking part in the evaluation component to make sure the promise is fulfilled.

I would to sum up my comments on governance with an analogy. This analogy comes from my experience with auto racing. No, I have never been a professional auto racer. However, my dad was an amateur racer and he took my brother and me to stock car races on a regular basis when we were growing up. I still have very fond memories of the experience. I think of NSGC in its early years as a man (or woman) with a fast car who has a dream of being a NASCAR contender. In the beginning, the only people involved in this endeavor are the man and perhaps a few friends with similar desires, needed expertise, and financial backing—we will call them the partners. Early on, each of the partners has to be involved in every aspect of racing. For instance, the driver cannot just focus on his driving skills. He and his partners also have to be able to maintain and improve the race car, manage the racing budget, find sponsorship, and do all the other tasks associated with taking part in the sport. But if driver is successful and starts bringing in more money, he and his partners can begin to hire people to take on some of these roles. As the number of employees grows and the driver's racing schedule becomes more rigorous, the partners may hire an office manager to oversee their operations. This frees up some of their time to focus on strategies for becoming more competitive. If they continue to have success, then they may decide that they need more than an office manager—they need a person with connections and expertise in the world of racing to help them get to the next level—an executive director.

In order to maximize their success, at some point in this process, the partners need to let go of their operational roles on the race team so that they can focus their energies on strategies for getting into the big races and winning them. But making the transition from operations to strategy can be really difficult, especially when people have invested their hearts and souls into those initial tasks that made the dream of racing a reality. It requires hiring/finding talented people to fill operational roles, giving them great direction, and then trusting that they will do their jobs well. It also requires that the partners develop new skills in leadership and strategic thinking. Will the race team fail to succeed if the partners cannot let go of their old roles and embrace the new ones? Maybe not—their hard work may still pay off. However, it might take them a lot longer to achieve their goals and they may never reach their full potential.

In this example, I see NSGC as a race team that is just beginning to enter the big races. In making the governance changes it did this year, the board, as partners in the organization, is making a commitment to focus on setting NSGC's direction, to develop strong leadership skills, and to trust that with good direction, the staff and volunteer

members can accomplish the needed operational tasks. The hope is that this will increase our chances of winning big races, like the race for professional recognition or billing and reimbursement, sooner rather than later. Just like in auto-racing, entering into the big races does not guarantee a win. Sometimes there are unavoidable obstacles in your way. Furthermore, when you are driving around in circles during a race, sometimes it is hard to tell if you are making progress. But in making the governance changes it did this year, the board and staff have demonstrated their commitment, with the help of our volunteer members, to be the best, most productive team possible for this organization.

I would like to close with a few acknowledgements. First, I would like to acknowledge my dad who taught me never to quit until a job is done. I would also like to acknowledge my mother-in-law, who in her experiences of

copied with a daughter with Prader–Willi syndrome showed me first hand that what we do is truly important to the families we serve. Next I would like to acknowledge two incredible high school teachers, Mr. Frederick Case and Mr. Robert Enszer, without whom I would have never had the foundation in biological sciences needed to succeed as a genetic counselor. Finally, I would like to acknowledge the faculty, genetic counselors, and my classmates at the University of Minnesota, the colleagues and students I have been so fortunate to work with in South Carolina, Georgia, and Michigan, the current and former NSGC board members and committee members I've had the honor of volunteering with over the years and our executive directors and staff, past and present. You are my motivation for being here today and I will do my best to represent you and the entire genetic counseling profession well.