

The Board of Trustees and a fly on the wall

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It is very late in a day that can only be viewed as extremely contentious. Everyone is worn out because the rhetoric has been rough and the battles have been difficult as the board tried hard to do its work. The table is littered with very large folders that represent board books and background materials; some contain hundreds of sticky notes whereas others are free of notes; this probably relates to whether the material was read or not; perception is probably correct in this case. With one exception, everyone is worn out, but the battle rages on. The President has tried to maintain order but he appears tired and disengaged at this point; perhaps he is answering e-mails (or playing Candy Crush). The speaker seems sad because during one heated argument the gavel broke and he is now maneuvering the pieces as if trying to figure out how it can be repaired. Two motions to adjourn have been ignored. Most of the board members are slumped in their chairs hoping that the day will soon be done. At times, they talk quietly among themselves; the main issue appears to be where people are going for dinner. They don't dine as a board, because that is apparently the time set aside to twist arms, engage in horse trading, establish voting alliances, and make deals about what will happen tomorrow (ie, secret meetings). Two members who argued strenuously earlier in the day have divorced themselves from the current issue and have moved to the far end of the room by the credenza where the whisky and cigars are kept. Even though they disagreed earlier, they are now engaged in a sidebar and are smiling and joking around as they sip from their coffee cups. Standing in the center of the room is a bully who has commanded the meeting. He wanders the room, points his finger at board members and staff, speaks incessantly in a loud voice extolling the virtues of his point of view and shooting down opposing opinions. He interrupts other board members and gets even louder, more rude and vulgar in response to dissenting views. The bully is well known for his negativity, not reading the

needed materials, not completing tasks that he was assigned, not attending mandatory meetings, breaching confidentiality, and voting based only on personal beliefs. He is also well known for criticizing everything and everyone. For the most part the other members of the board do not want to confront the bully; they want this all to end by staying silent and thus encouraging that a vote be taken. But if it does and the result is contrary to the bully's suggestions, a motion to reconsider is next.

Now for a fact check. I am the fly on the wall; that is true. I am a member of the AAO Board of Trustees (BOT), I attend all the meetings of the Board as a helpful resource, but I do not vote. A fly on the wall is generally taken to refer to a person who watches and listens to others without being noticed and without interfering in the situation. As to the above description of the BOT, this is completely false ... I just made it up so as to describe what a dysfunctional board might be like. You will be overjoyed to know that it does not relate to the AAO Board of Trustees at all.

When I came onto the Board it was by appointment and it was sudden. I had no idea what to expect. I had heard a few unsubstantiated stories about the BOT, but did not know what was true and did not know the members of the Board at all. So I decided that I would study the bunch and how they conducted their business and then later, a few years down the road, I would write this editorial to share my impressions with the AAO membership.

My education started quickly around the time of my appointment 5 years ago as Editor-in-Chief of the AJO-DO. At that time comments appeared on the Internet characterizing the trustees as "old, fat, and arrogant." Now, although they are not young—it takes time to rise to this level of leadership—most are younger than me. Furthermore, many were in very good shape because they exercised regularly, some intensively. Finally, they were not arrogant in any way unless one equated arrogance with experience and knowledge.

Another claim I read online, after an AAO Annual Session held on the west coast, was that the AAO Board members and staff went on junkets after the meeting with their expenses paid for by the AAO. I heard this

news while waiting for a plane to take off going back to St. Louis right after the Annual Session was over. So I knew that claim was false and so did all of the AAO staff members (about half of them) who were on the same plane. To close this story, none of the AAO Board members went on junkets paid by the AAO. This was totally fake news.

Finally, a claim was made in 2017 that the AAO had appointed a task force to study obstructive sleep apnea and orthodontics and that the document they were to write had already been written. Out of personal knowledge, this is patently false because the task force had not yet even met and had not written a single word.

What these 3 “news” items told me was that the perceptions about the activities of the AAO BOT do not always match reality. In the case of these 3 examples, the distortion was likely intentional, using the tactic of “if you don’t know something, just make up a story that fits your own reality.” In other communications I have read, this disconnect might exist because of an imbalance of knowledge between the trustees and the members. No matter the number of AAO publications that serve to inform, the trustees are always more up-to-date and knowledgeable than the general membership.

So, what are the trustees really like and how do they operate? I have served on the board for 5 years now and some of the people involved have come and gone over that time. So my comments will generalize as to the group, not the individual trustee. Be assured, however, that they do vary individually in many ways (eg, personality). Beyond that, the Board was nothing like I expected.

PERSONAL

In terms of personal attributes, the members of the Board are intelligent, committed, assertive, passionate, and diverse in their perspectives. They are communicative and open-minded and respectful of the views of others. They collaborate very well with others, are able to build sustainable relationships, and are loyal ambassadors for the specialty and the association. At times they must be brave (but not careless); at other times they must say no to good ideas (ie, they must sometimes prioritize). Importantly, they have the ability to remain calm, cool, and collected during stressful or difficult circumstances. They are always well prepared, responsible, and mindful of the impact they may have. Individually they are effective leaders with a long history of service. They are also mentally healthy. Finally, they have excellent memories; as an example, they always remember that they were elected to office by those who respect

and trust them to do their best for the specialty and the members of the Association.

THEY FOLLOW THE RULES

The Trustees believe that problems are best avoided through written policies, following governance structure, and maintaining a positive organizational culture. There are many, many policies and rules that serve to protect the Association. In particular, the BOT members are very mindful of conflicts of interest and the need for confidentiality when appropriate. They know that there is policy for dismissal of a board member (behavior, meeting attendance, etc). They know that their personal conduct must be above reproach; otherwise their personal reputation and that of the organization might be compromised. They are aware that a Board that is ignoring the rules will likely fail to make decisions that are in the best interest of the Association, and that tales of a poorly functioning board have the potential to escape from the confines of the boardroom, causing negative publicity and sowing discord among the members.

THEY HAVE RESPONSIBILITIES

It is expected that the BOT members accept some basic responsibilities. For example, the Trustees must determine the mission and vision of the organization and work smoothly to promote the mission and derived programs. They must also engage in effective planning and enhance the public image of the association. The Board must also evaluate itself and work to improve the Board; for example, they are now working hard on the issue of diversity. They must monitor and strengthen programs and services. They must also exercise appropriate financial oversight; they must be good stewards of the Association’s resources. The Board is also responsible to support and evaluate the chief executive, maintain sound board policies and structure, and conduct productive board meetings (based on an assessment of the BOT, BoardSource AAO, 2017).

They do not carry out their work alone. The Board works with the House of Delegates to create action items, distribute tasks, and work with staff members and AAO members (councils, committees, task forces, etc). They also develop a system of checks and balances to monitor the assigned team to ensure that tasks are completed in a timely fashion.

WHAT REALLY HAPPENS AT BOT MEETINGS

The real BOT meetings are efficient and effective. About a month before the meeting, the board members receive all the materials they will need to consider in conducting their meeting. The best part of this is that they

will have an opportunity to consider the material and express their opinion on each matter via a management program before they arrive at the meeting. As a result, those matters where all of the BOT members agree positively are moved to the consent agenda. This saves a lot of time.

The meeting is conducted in an orderly manner by the President and the Speaker. These 2 individuals keep the meeting on track but they also encourage participation by all. You should also know that the speakers do not drone on; there is a timekeeper who keeps track. As a result, the speeches tend to be more accurate, brief, and concise. The environment is never hostile; it is always respectful. And there is an air of trust that characterizes the interaction.

CONCLUSIONS

The Trustees are easy to admire. They are volunteers to be sure; they work hard but their reward is psychology. They have given of their personal and work time to make a difference. Some are true visionaries who, with great passion are driven by a cause, a focus, service, and a greater good. They have been elected by those who know them well.

The trustees know who the owners are, they know that they are accountable to the membership, and they know that the membership expects positive results. Finally, they know that the functioning of a Board of Trustees is a direct reflection of the health of the organization. If the Board is focused, healthy, and mission driven, the organization will be, too.

Now, why did I write this editorial? Of course, I wanted to inform the membership as to the nature and qualities of its Board of Trustees. They are not perfect and you may not agree with them in all circumstances. That is normal and important, but one cannot argue their dedication and hard work.

On the other hand, I also wrote this editorial as a job description for all the younger folks out there who might aspire to help their specialty at the highest level sometime in the future.

QUOTE

“Great organizations demand a high level of commitment by the people involved.”

—Bill Gates (American business magnate, investor, author, philanthropist, and humanitarian)