
No Tricks, Just Tips
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NO TRICKS, JUST TIPS · OCTOBER 30, 2026

What people actually need when they bring you a problem

Phil Miller

Interim Executive Director/CEO and COO
California Water Environment Association

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ABOUT

Phil Miller; MBA, M.Ed.

- CWEA: Interim ED/CEO and COO
- 5+ years Board Chair experience
- 10+ years lead responsibility for org culture initiatives
- Favorite Halloween candy: Reese's
- Recovering problem solver

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Who here is a problem solver?

Keep them up for a second

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A DETOUR

An article that changed my marriage.

Hold that thought · Stay with me

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THE SOURCE

“When Someone You Love Is Upset, Ask This One Question”

Jancee Dunn · The New York Times · 2023

Scan to read it

Not my framework · Just a very satisfied customer

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DO YOU WANT TO BE…

Helped

Give me a solution

Heard

Listen and understand

Hugged

Comfort me

We literally ask each other · It tells you your job for the next ten minutes

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AND I HAVE DATA

In three years of asking, how many times has my wife answered “helped”?

1

Take a guess

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BACK TO THOSE HANDS

We all got here by solving problems. Fast.

It got us noticed and promoted · Fixing feels good, to us

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People who want help usually ask for it.

When they don’t ask, don’t assume.

“I need your help” is easy · “I just need you to listen” isn’t

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WHAT HEARING SOMEONE SAYS

“You can solve this. I just want you to know I see how hard it is.”

A quiet compliment · Sometimes people can’t solve it and that’s ok

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QUICK QUESTION – SHOW OF HANDS

Who here has solved (tried to solve) a problem that didn't need your solving (helping)?

Hands up · Mine too

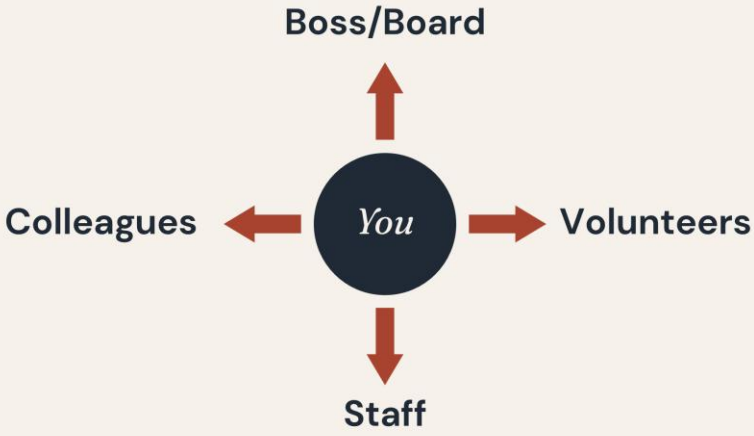
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Guilty.

Why? Not solving feels uncomfortable

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UP · DOWN · SIDEWAYS



Boards want to be useful · Volunteers often want to be heard · Understand what conversation you're in

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IF YOU'RE THE ONE BRINGING IT

"I don't need you to fix this. I just need you to listen."

Especially if you don't supervise anyone

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A budget.
A worry.
Real people.

The other side of the desk

17

“Have you considered…?”

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Alone with it.

I've missed that moment too

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WHAT I NEEDED

To be heard

"I understand how stressful this is. That's a huge worry to be holding."

To be comforted

"I'm in this with you, and we'll figure it out together. You aren't alone."

Two things, neither one a solution

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HEARD AND COMFORTED

Neither one fixes anything.

That's ok.

No one was cut; the isolation was real anyway

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MAKE IT YOURS

Keep the purpose. Change the words.

Word for word is fine · So is your own version · Adjust to your audience

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WHAT IT SOUNDS LIKE AT WORK

> *"What would be most helpful right now?"*

> *"Do you want me to problem-solve with you, or something else?"*

> *"I have some thoughts and suggestions. Do you want them? Or do you want to share with me what's on your mind first?"*

Find the version that sounds like you

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QUICK QUESTION – WRITE IT DOWN

Picture a work relationship. What way(s) of asking the 3Hs will be most effective that you can use next week?

One person · Your words · Next week

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Helped, heard, or hugged?

“Heard.”

— Yaya (daughter)

The question is the easy part

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YOUR CHALLENGE THIS WEEK

“What do you need from me right now?”

Or your own version. Ask it. Give what’s needed. Consider asking for feedback

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Making the Most of a Tiny Event Budget: Creating a Superior Attendee Experience



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"People will forget what you said, people will forget what you did, but people will never forget how you made them feel."

-Maya Angelou



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THE FEEL METHOD

F Find Your Purpose

E Elevate Through Negotiation

E Engage Their Senses

L Leave a Lasting Impression



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F · FIND YOUR PURPOSE

START WITH WHY.

Connection • Education • Celebration • Revenue

04



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E · ELEVATE THROUGH NEGOTIATION

ASK FOR MORE.

Wi-Fi • Coffee • Upgrades • AV • Space

05



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E · ENGAGE THEIR SENSES

CREATE THE UNEXPECTED.

Music • Surprises • Giveaways • Fun

06



33

L · LEAVE A LASTING IMPRESSION

MAKE IT MEMORABLE.

Welcome • Connection • Inspiration

07



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AUDIENCE CHALLENGE

YOUR BEST IDEA?

Think. Share. Borrow.

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“People will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

-Maya Angelou



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BEYOND THE PROMPT

The Human and Organizational Side of AI

A different conversation about people, systems, and how work gets done.

Ben Bradley Director of Operations, SRBX

ASSOCIATION & NONPROFIT LEADERSHIP

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BEYOND THE PROMPT

WHERE IT STARTED

What would it take to bring an AI agent into our organization?

THE FIRST PLAN

An AI policy → Guidelines → Roll it out to staff

TAKEAWAY

Necessary. But was it the whole answer?

02

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BEYOND THE PROMPT

A DIFFERENT QUESTION

How healthy is our organization to begin with?

- Years of information spread across different systems
- Procedures passed from one person to the next
- Methods that evolved without anyone asking why

87.5%

AI use for content

44.3%

AI use for data

Most of our AI attention has gone to individual productivity.

ASAE · 2026 State of Associations

TAKEAWAY

Are we preparing our organizations as much as our people?

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BEYOND THE PROMPT

A QUICK FLASHBACK

HOW I GOT HERE

Why an operations person cares about this

THEN · AROUND 2013

Built a trade association

From six members to more than 600

ALONG THE WAY

Consulting with businesses

Same goal, very different ways of getting there

NOW · SRBX

An operations lens on AI

Process and people, together

TAKEAWAY **Every process has a history.**

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BEYOND THE PROMPT

ORGANIZATIONAL HEALTH

?

Is there a process in your office that only one person understands?

AI can make a broken process faster.
That doesn't make it a better process.

1 in 4

nonprofit executives said their organization's data was organized enough to support AI.

NTEN / Bridgespan · 2026 · executive respondents n=404

TAKEAWAY **Getting ready for AI makes us a better organization anyway.**

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BEYOND THE PROMPT

THE HUMAN ELEMENT

? Who really knows how the work gets done?

The people closest to the work are often the people closest to the solution.

A REAL EXAMPLE · SRBX + CIEF CONTACT MIGRATION

1 Shadow lists built up across departments → 2 AI surfaced overlaps and patterns → 3 People explain why each list exists

TAKEAWAY

Bring people into the change, not just the training.

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BEYOND THE PROMPT

FROM TOOLS TO INTEGRATION

From suggesting to doing

Same department. Very different responsibility.

AI AS ASSISTANT

Helps draft a member renewal email

A person reviews it, edits it, and decides whether to send it.

AI AS AGENT

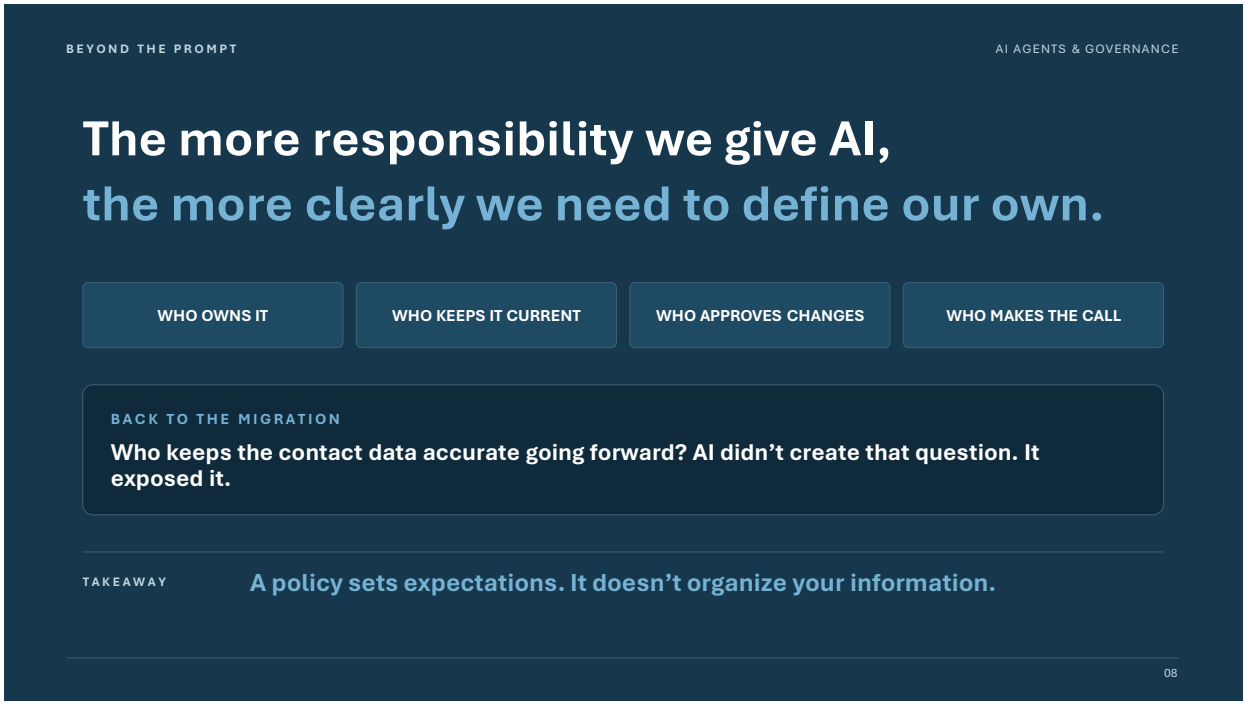
Accesses and updates member records

Who decides what it can change?
How does it know a record is correct?
Who approves changes before they go live?
How do we catch and reverse a mistake?

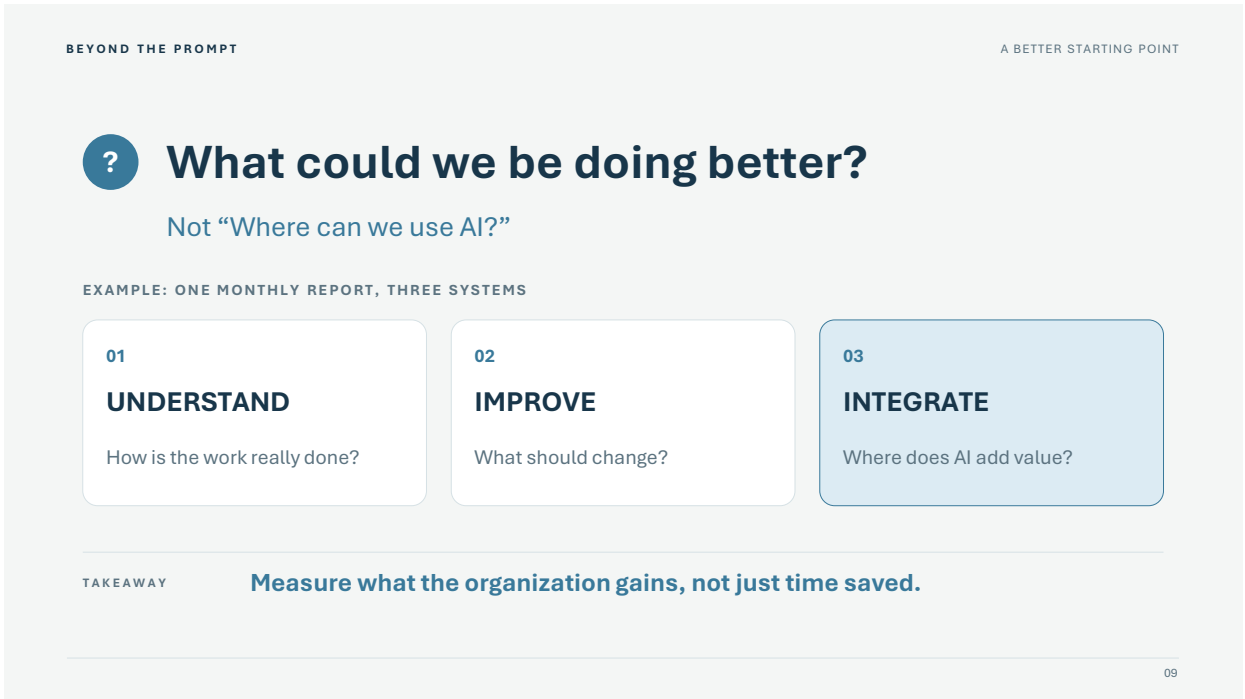
Illustrative example. Not deployed at SRBX.

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BEYOND THE PROMPT
AI AGENTS & GOVERNANCE
The more responsibility we give AI,
the more clearly we need to define our own.
WHO OWNS IT
WHO KEEPS IT CURRENT
WHO APPROVES CHANGES
WHO MAKES THE CALL
BACK TO THE MIGRATION
Who keeps the contact data accurate going forward? AI didn't create that question. It exposed it.
TAKEAWAY
A policy sets expectations. It doesn't organize your information.
08

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BEYOND THE PROMPT
A BETTER STARTING POINT
What could we be doing better?
Not "Where can we use AI?"
EXAMPLE: ONE MONTHLY REPORT, THREE SYSTEMS
01
UNDERSTAND
How is the work really done?
02
IMPROVE
What should change?
03
INTEGRATE
Where does AI add value?
TAKEAWAY
Measure what the organization gains, not just time saved.
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BEYOND THE PROMPT

TAKE IT BACK WITH YOU

Three questions for your organization

? Do we really understand how our work gets done?

? Are we involving the people doing the work in finding better ways to do it?

? **Are we making existing processes faster, or rethinking how they should work?**

TAKEAWAY **Start small. Learn as you go.**

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BEYOND THE PROMPT

THE BIGGER OPPORTUNITY

The goal isn't simply to build organizations ready for AI.

It's to use AI as an opportunity to build better organizations.

Ben Bradley · Director of Operations, SRBX · **bbradley@srbx.org**

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