

Trust...the key
leadership
competency of
every
organization

“For we are not fighting against people made of flesh and blood but against evil rulers and authorities of the unseen world, against those mighty powers of darkness who rule this world and against wicked spirits in the heavenly realms.”

Ephesians 6:12

Two Rules That Define Board & Staff Relations

By Craig & Beth Chase, Chase Advancement Inc

It's an age-old issue among large and small pregnancy help organizations -- where does the organization draw the line between board roles and staff responsibilities? Clearly, there is no one-size-fits all paradigm for all pregnancy centers, but there are two rules that are foundational to understanding the differences in the roles and responsibilities of the board and CEO/Executive Director.

RULE #1

The Board Shall Function As One Entity

No board member acts independently of the board

RULE #2

The Board Shall Govern and Shall Not Manage Operations

Day-to-day operations belongs exclusively to CEO/Executive Director



The consequences of breaking these two rules are serious in that it leaves the most vulnerable underbelly of a pregnancy help organization -- the board and staff relationship -- open for attack from the forces of darkness assigned to stop pregnancy centers. And this can be brutal.

Breaking these rules often leads to a self-perpetuating spiral....trust between board and staff becomes attacked then rumors spill beyond the organization's borders, then programs suffer, then funders lose interest, then board/staff trust becomes further gnarled, programs suffer more, then additional funders lose interest, etc.

Rule #1 - Case Study

Jim is a member of the board of the CPC of USA. One day Jim comes to the office of Sue, the Executive Director, and tells her that she needs to hold more volunteer trainings and asks that she provide a calendar for him indicating when the additional volunteer training will occur.

Question: Does Jim have the power to make this request of Sue?

Answer: No, this request is outside of Jim's role as a board member. If there is a concern about needing more volunteer trainings this discussion should include the entire board.

Board members have individual viewpoints and positions but they alone cannot cause action.

Respecting these two rules will go a long way in building and protecting Board and staff relationships.

Rule #1
The Board Shall Function As One Entity

differing and individual viewpoints, no individual board member should alone cause action.

This means that it is the role of the board as a whole to direct the CEO/Executive Director. No one board member has the authority over the CEO/Executive Director that a supervisor has with a subordinate.

For example, the board chairman is not a supervisor, but instead acts as a convener and leader for the board, which as a group provides *feedback and direction* to the CEO/Executive Director.

Just imagine the chaos and workload that could occur if all of the board members were independently giving directives to the CEO/Executive Director. (ouch!)



(Note: The exception to this rule is addressed in our governing e-Book, "When to Rattle the Cage".)

Rule #2
The Board Shall Govern and Not Manage Operations

As a board member, your two primary roles are *governance* and *support*.

The board as a whole directs policy and strategy — the board establishes a strategy and then measures the success of certain goals.

Board members who get involved in day-to-day operations typically hurt the organization's ability to move ahead.

Boards providing clarity and strategic direction with desired outcomes for staff are generally the most effective boards.

Rule #2 - Case Study

The Board had approved \$1,500 to purchase a new client tracking system.

The Executive Director, Dana, chose a system within budget.

The treasurer had found a similar system that cost less than the one Dana purchased and brought his concerns up at a board meeting.

Dana defended her decision but left the meeting feeling attacked and wondering if the Board really trusted her.

Question: Should the Board Chairman have allowed this discussion to occur at the board meeting?

Answer: No, the Board Chairman should never have allowed this discussion to take place as it was the role of the board to approved the budget and then to release the decision regarding which system to purchase to the Executive Director.

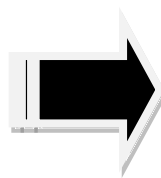
There is a natural tendency for pregnancy center board members to micro-manage staff because they care deeply about their organization, but the bottom line is that staff need room to create strategies and systems on their own to build a better organization.

Organizations thrive when board members completely release day-to-day management to staff.

When *The Board Shall Govern and Shall Not Manage Operations* rule is broken it takes a huge toll upon the Executive Director as too much monitoring can lead to deflated staff morale and confidence.

If this is an issue, our counsel is always for the Executive Director to speak to the board regarding this matter rather than letting tension and frustration build. Boards, please pay attention and act appropriately if your CEO/Executive Director raises this as an issue.

In addition, we recommend that each board member and the CEO/Executive Director sign a document that clearly outlines each other's responsibilities prior to accepting his/her role.



Sometimes, however, relationships become so raw that it's helpful to seek the help of an experienced consultant who can help get things back on track.

The biggest encroachment is **the board having to review every move of the executive director**. From fundraiser letters to program decisions, hiring, public statements, use of funds, etc.

Which staff role is most commonly encroached by board members?

GREAT BOOKS

The Handbook of
Nonprofit Governance
Published by
Boardsource.org

The Board Chair
Handbook
By Mindy R Wertheimer

The Speed of Trust
By Stephen Covey

When the board (or its members) do get involved in day-to-day management – i.e., office equipment purchases, staff hiring or firing or salary decisions (of staff other than the CEO/Executive Director), sitting in on staff meetings, looking at invoices or receipts - is generally a signal that significant core problems may exist that threaten the health of the organization.

CONCLUSION

Now, more than ever it is critical for boards of directors to function exclusively as one entity and to limit their activities to governing the organization rather than managing day-to-day operations.

The content of this e-Document barely scratches the surface of this common problem facing boards of pregnancy help organizations.

Craig and Beth are available for private consultations by phone. In addition, they provide trainings in governance, risk management and organizational development.

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