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Building Healthy Board/Staff Relationships

This seems to be the season of relational dysfunction between boards of directors and staff leadership. I am seeing so many more examples among my association clients and in my volunteer life. Examples range from minor indicators of the need for better communication to truly disruptive behavior that negatively impacts organizational effectiveness. This article shares three of the most egregious examples. All identifying information has been changed to protect the guilty. It then provides practical strategies for improving the board/staff dynamic.

Three Egregious Examples

At a recent meeting to craft a strategic planning session for a large trade association the elephant in the room was the rancor between the new Board President, duly elected by the membership, and the Executive Director, in the ninth year of her tenure with the association. It appeared that the two were speaking different languages.

Mike, the Board President, was talking about a need to return the association to its loosely structured, laissez fair modus operandi. He was lamenting days gone by when association events ended with staff and officers inebriated in a hotel suite.

Anne, the Executive Director, was discussing the business imperatives of member retention and membership growth. She kept calling attention to the fact that she and her team had pulled the association off the precipice of financial insolvency, member attrition and a plethora of other problems.

As the meeting dragged on it became apparent that each of these leaders had different agendas and no interest in creating common ground. The meeting ended with Mike storming out saying “Anne, you work for me! Me and the members who pay your salary! We’re tired of your uptight, rigid approach. You’ve taken over our association and are killing its spirit.”

While Mike and Anne had a contentious relationship, the next example reflects a little too much closeness between a Board President and an Executive Director. A small, nonprofit is led by Julie, a genial Executive Director who admits to being beyond her depth in the current organizational environment. When she was hired seven years ago there were three other employees.

The organization has been successful at winning grants and garnering donor support. As a result, they have grown to a staff of 15 paid employees, many more volunteers, and the Board of Directors has expanded its size from 11 to 15. These seem like enviable problems. They would be if the Executive Director were not so very limited in her leadership competencies and if Ginnie, the Board President, weren’t so deeply committed to protecting Julie and putting her needs above those of the organization.

This situation became an apparent problem to Board members when

Editor’s Note - Hear more of Joanne Smikle, PhD’s insights at Seasonal Spectacular December 3 at the Sacramento Convention Center. Joanne will present “Making Strategy Stick - Moving from Rhetoric to real action!” during the morning education programs. Go to www.calsae.org for details.





Relationships

Julie requested that they conduct an operational assessment. She did not want an assessment because she had a desire to assess or improve operations. She wanted an assessment because she was having a hard time managing the staff and wanted to get rid of the two employees who openly challenged her leadership.

She and Ginnie put a Washington D.C.-worthy spin on the situation and sold the Board on spending more than \$10,000 to hire another of their friends to assess the organization. (I forgot to mention the fact that these two have been very close friends for more than 30 years.) At the end of the assessment the two staff were fired; one with seven years of service was terminated via telephone because Julie and Ginnie hated direct confrontations.

The assessment concluded that Julie was the salvation of the organization able to lead it into a bright future. These findings were ludicrous if for no other reason than the fact that Julie was nearing retirement, had never before managed a staff or budget this size, and had clear difficulty building relationships in the community beyond a very small group with whom she and Ginnie had long been connected through their previous employment.

Fortunately, there were a few skeptics on the Board who questioned the quality and objectivity of the assessment results. The skeptics have been able to surface some of the unhealthy collusion between Julie and Ginnie and move the Board into more objectivity regarding Julie's performance, the chronic staff turnover, and low morale. However, Julie and Ginnie had, by force of their seemingly sweet personalities, built what amounted to a little ladies nonprofit cabal on the Board. The tension still exists between factions loyal to the ladies and a new faction of newly elected members who want transparency and objectivity at the Board level.

The final example of a less than optimal board/staff relationship emerges from an association whose goal is to advance the aims of a particular affinity group. Advocacy for the affinity group is a critical component of their mission. Ellen, the Executive Director, has created lore touting the fact that she worked her way up through the ranks. She began as a student intern while in college 15 years before becoming the Executive Director. As it really happened, she had strong political connections through her family. Those connections paved the way for her ascent to the Executive Director role.

Throughout her tenure she was known to be a smooth political operator who did a masterful job managing, or manipulating (depending on who is telling this story) the Board, donors and other key stakeholders. Inside of the organization she and her leadership team were described as mean and vindictive. They created a culture of fear and intimidation among the 200-person staff.

The retirement of four Board members caused a sea change that led to the election of new members who commissioned an organizational assessment that measured climate, culture and other relevant factors. Rather than immediately ending Ellen's tenure, they offered her and her team executive coaching. She declined the offer and was invited to resign. Within the next several months her entire leadership team found other employment.

Lessons for Board and Staff Leaders

These examples, drawn from my actual, albeit painful, experience, draw attention to the fact that there is a need for an examination of the board/staff relationship. In order for the working relationship to be productive, clarity of roles is essential. While not mentioned in the examples presented, there are times when Board members want to be overly involved with operations. Their responsibilities are strategic. They are to help the organization craft a compelling strategy that guides it to reaching its fullest potential. By the same token, one of the struggles that Julie's Board faced is that Ginnie had involved the Executive Director in domain that was beyond her responsibilities. Julie operated under the mistaken notion

that she was a voting member of the Board.

The relationship is made more productive when Board and staff share a vision for the organization. In the first example, Mike and Anne had very different views of where the association should move. When new leadership enters the equation, either new Board officers or new staff, one of the first issues that must be clarified is the vision that each has for the organization and the vision that he has for his role. This discussion should happen early in the formation of a new relationship. Mike and Anne were never able to have that conversation without an argument erupting. He was mourning a long-gone past and she was committed to positioning the organization for a viable future. As it happens, Anne resigned her role. Her replacement was better able to communicate with the Board's leadership and build a more collaborative, future-focused relationship.

Both Board and staff are well-served when an organization conducts periodic assessments of organizational effectiveness. A thorough assessment

will gather insights from internal and external stakeholders. A thorough assessment also gives both the Board and the staff a factual starting point for organizational improvement efforts. Boards often rely too heavily on the Executive Director's insights in their decision-making. This was certainly the case with Julie. She, for a time, was the Board's only source of information about the organization's operations. That over-reliance creates an imbalance and makes deception a very real possibility.

When Julie retired and the Board commissioned a partial assessment many members were surprised that the organization's position in the community was not as strong as they had been led to believe. The same applied to the internal dynamics with staff; they were quite different than what Julie and Ginnie had been presenting to the Board. Periodic assessment provides the Board with another tool in its quest to be objective leaders able to make clear, well-informed strategic decisions.

Summary

The examples presented shine the light on dysfunctions that can emerge

between Board and staff. They created frustration for all who participated. Those frustrations could have been prevented if the leaders involved had developed clarity on their roles and responsibilities. Moving from clarity on roles, it would have been beneficial for them to build dialogue about vision for the future of the organization. Ideally, Board and staff leaders would co-create a shared vision that they would collaboratively make reality. Finally, most organizations would benefit from periodic assessments. Data gathered from assessments enables leaders to plan meaningful organizational improvement efforts that maximize effectiveness and outcomes.

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