

## **Balancing the Work of the Board and Staff**

The Board and the Executive Director of an organization are both focused on facilitating the development of the organization. Because they have similar goals, yet different responsibilities, they are engaged in a never-ending balancing act in which they are trying to achieve stability between their respective roles. At first glance, the boundaries between the two may seem clear: while the Board is charged with determining the organization's mission and goals, the Executive Director decides how coalition staff will work towards implementing those goals. However, as an organization changes and different people join the organization with varying expertise, the boundaries may become confusing. In order to accomplish their jobs within the organization, both the Board and the Executive Director must understand where their roles start and stop. The Board and Executive Director are simultaneously dependent on each other for achieving the goals of the organization, yet they function independently of each other on a day-to-day basis. While the Board of Directors constitutes the legal body of the organization, the Executive Director is responsible for the daily management of the organization. The Board is responsible for establishing policy, determining the mission, and setting goals for the agency. The Board does not, however, make its decisions in a vacuum. In fact, the Executive Director must give the Board the information it needs to make clear decisions about the goals for the organization. The Board should then use that information to guide its decisions. Because of the importance of these roles in maintaining organizational health, the boundaries of each position must be clarified. In many organizations, the most useful tools for establishing the parameters of these positions are job descriptions. The job descriptions should be reviewed annually and updated as needed. In determining their specific duties, it is important to understand that Board members wear two hats when they serve an organization. Each Board member has a responsibility as a member of the larger governing body of the organization – in this role, the Board acts as a unit. Board members are never individual policy makers and governors. But as individuals, Board members have the responsibility to contribute their personal expertise to the organization. In this role, Board members act as advisors to the Executive Director.

The different roles of the Board vary with the lifecycle of the organization. At the beginning of an organization's life, when there may be few or no Staff, the Board will frequently be the only group of people tending to the day-to-day management of the agency. Board members may

answer the phone, write checks and work with funders and other service providers. After an Executive Director is hired, the Board should begin transitioning out of the day-to-day tasks at the agency and should instead focus on bigger picture items, such as setting policy and strategically planning for the organization's future. Regardless of the new task, as more Staff become a part of the agency, a new Board of Directors must focus on setting the parameters for the agency's work, and trust that the Executive Director will implement those parameters with staff .

Often, these transitions within an agency are not smooth and require patience, attention, respect and room to make mistakes and correct them. Because multiple transitions occur throughout the life of the organization, it will serve the agency and all people involved if there are clear communication lines established early on.

The Executive Director, in addition to overseeing the day-to-day management of the organization, is the Board's employee and serves as the link between the Staff and the Board. Although Staff may attend Board meetings, the Executive Director is responsible for reporting back to Staff about Board decisions. The Executive Director is responsible for maintaining a flow of communication between the Board and the Staff. In many coalitions, board members who represent direct service organizations, often interact with coalition staff within the purview of the staff member's job description. It is extremely important that the line between a member program representative, who is also a Board member, be maintained. Board members should not be interacting with staff on a regular basis (other than the Executive Director). One exception is if there is a grievance filed against the Executive Director by a staff person. *BoardSource* found that Executive Directors who have strong relationships with their Boards have the following six skills:

- facilitating interaction in Board relationships,
- showing consideration and respect for Board members,
- envisioning change and innovation with the Board,
- promoting Board accomplishments and productivity,
- initiating and maintaining a structure for Board work, and
- providing helpful information to the Board.<sup>1</sup>

As the agency grows and the need for the Board to expand its work becomes apparent, Executive Directors may be surprised to discover that working to develop the Board is their responsibility. We must remember that the Board members are usually volunteer community members who may or may not understand what it means to serve on the Board. The Board may be looking to the Executive Director for leadership in developing the Board. The Executive Director is responsible for developing a strong and healthy organization. If the Board needs help, it becomes the responsibility of the Executive Director to help the Board achieve its development goals. In order to meet the ever-changing demands that face an organization, all Board Members and the Executive Director must remember to work together to strengthen the agency as a whole. At times there will be conflicts between the Board and the Executive Director. Often these tensions can be alleviated through the use of good communication skills. The Board and the Executive Director must remember to be clear about the expectations they have for one another and to continue to respect each other in these important and very difficult roles.

## **Organizational Life Cycles**

Organizations experience many transitions throughout their lifetimes. The roles and responsibilities of the Board and the Executive Director must shift during each of these phases, in order for the organization to grow and develop. Some phases that organizations experience may include:

Infancy: The organization is brand-new. In this phase, it is common that the Board of Directors be completing most of the work of the agency. Often there are no paid Staff when an agency first begins.

Childhood: The organization has been up and running for a few years. An Executive Director and some staff have been hired. The Board must begin to focus on bigger picture items and leave part of the day-to-day business to the Executive Director. The Board may still be involved.

Adolescence: The Executive Director is operating the day-to-day business. The Board is adjusted to its role in policy and governance. The Board begins to expand its role to begin aggressive fundraising and marketing.

Adulthood : The Board is fully invested in organizational planning, fundraising, and policy development. The Executive Director fully operates the day-to-day business.

Mature Adulthood: The Board is highly functioning; the Executive Director is managing the agency and implementing policies and procedures and is seen as the voice of the coalition; the coalition is well respected by its collaborative partners.

## Determining Board and Staff Roles

Adapted from the Action Handbook for Boards, created by the Support Center for Nonprofit Management/National Minority AIDS Council. 1995.

Topic Area	Board Responsibility	ED Responsibility
Mission	Set mission of agency	Give input on mission
Accountability	Constitute legal entity of corporation, ensure organization adheres to policies and by-laws, ensures agency is well-managed and complies with legal requirements.	Ensures contract compliance. Regularly reports to funding agencies. Regularly reports to Board.
Planning	Establish organization's strategic plan and long-term goals. Assess trends in field to determine future of organization. Evaluate organization's progress towards goals.	Lend expertise to Board in developing strategic plan and goals. Develop programs and activities that strive to meet long-term goals and mission. Provide regular reports to Board. Give input to evaluation process.
Finances	Set financial policy, approve budget, review financial statements. Legally responsible for financial obligations of organization. Oversee annual audit.	Manage daily finances, develop budget. Develop financial reports for Board. Complete financial activities in accordance with policy.
Personnel	Select, monitor, evaluate Executive Director. Set all personnel policy. Establish	Manage human resources beyond ED, in accordance with policy. Establish hiring/

	levels of compensation (and benefits) for all positions.	termination procedures. Ensure staffing of corporation.
Board Development	Evaluate and assess Board composition. Identify training needs, set Board meetings, identify and recruit potential Board members.	Help identify potential Board Members. Assist in training and orienting Board. Provide Staff support to Board activities.
Public Relations	Represent agency in community. Determine agency's marketing plan.	Represent agency in community. Ensure that connections are made between the agency and community.
Fundraising	Ensure adequate organizational resources: develop funds, donate money, identify new resources, cultivate donors.	Identify new resources, assist in fund-raising, track donations, send receipts, write grants.