Susan Schaefer and Bob Wittig together have over five decades of nonprofit experience. When Bob served as executive director of a growing nonprofit, Susan was his board chair...and they’re still talking! They each continue to serve on and coach dozens of nonprofit boards.

Thomas Edison famously said that “genius is 1 percent inspiration, 99 percent perspiration.” This For the GENIUS book provides the right balance of inspiration and perspiration...without making you sweat too much...to help you improve your skills. Bob and Susan give you a structure for the hard work of governance so that you’ll be equipped, long after reading this book, to be a confident, successful board member.

Nonprofit Board Service for the GENIUS offers practical guidance that will help you:

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- Understand your requirements and responsibilities
- Advance your knowledge in governance and oversight topics
- Partner with and support the executive director
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Susan Schaefer, CFRE
Bob Wittig, MBA
About This Excerpt

This excerpt of Chapter 19 of You and Your Nonprofit Board for the GENIUS is provided by National Council of Nonprofits.


To receive a 15% discount, use this coupon code: summerfun
Nonprofit governance is not easy, but Bob Wittig and Susan Schaefer have made it much more accessible. A reference for both the neophyte and the veteran, this book should be in the hands of every board member. It shows the way to an engaging and rewarding experience—in every detail. Don’t miss it.

**Fisher Howe**  
Author of *The Nonprofit Leadership Team: Building the Board-Executive Director Partnership*

Wow—really, wow! Seriously, the most understandable book I’ve ever seen for board members. Most are so boring, technical, and make presumptions about a newbie’s knowledge. Love it, love it.

**Lynn O’Connell**  
Nonprofit Management and Leadership Instructor at Colorado Free University

This uncomplicated, easily digestible book contains practical tools and tips for clarifying the essential building blocks of any mission-driven organization: goals, roles, processes, and relationships. And, using the guiding questions for each of the book’s sections will help any board newbie or long-timer sound like a GENIUS!

**Andrea Walker**  
Strategy/Organizational Effectiveness, National Education Association

A very practical go-to, how-to book for wannabe, rookie, and veteran board members. *Kudos to Schaefer and Wittig for starting from the premise that the board/organization commitment is totally mutual—meeting the needs of the nonprofit organization can’t be separated from meeting the needs of individual board members.*

**Hope Gleicher**  
Founding Board Member, Nonprofit Roundtable

*Nonprofit Board Service for the GENIUS* is an excellent, easy to understand, and illuminating discussion about serving on small- to medium-sized nonprofit boards. It should be required reading for every new board member orientation. I wish this resourceful handbook was available when I started serving on boards more than fifteen years ago. You’ll find yourself referring to it again and again.

**Suzanne Hazard**  
Governance Chair, InFaith Community Foundation
What People Are Saying about Nonprofit Board Service for the GENIUS…

There is no honor greater than being asked to serve on a nonprofit board...and no regret deeper than accepting without really knowing what you are doing. This is an easy-to-use guide that walks you through the entire experience, so whether you are a newcomer or a veteran, you will know what it takes to serve with confidence and distinction.

Greg Baldwin
President, VolunteerMatch

If you serve, or have ever thought about serving, on a board this is a book you’ll always want to keep within arm’s reach. It has the answers to any question you might secretly harbor in an easy-to-access, easy-to-follow format.

Terrie Temkin, PhD
Founding Principal, CoreStrategies for Nonprofits, Inc.
Editor and Contributing Author, You and Your Nonprofit Board

This must-read guide covers all aspects of board responsibilities and is easy and entertaining to read. It is well organized, includes sample tools and policies, and can be read cover-to-cover or by topics of interest. This insightful guide will give people confidence to take the important step of joining a nonprofit board. If you’re considering board service, or are currently on, or work with, a board, this book is for you.

Suzanne B. Laporte
President, Compass

Nonprofit Board Service for the GENIUS covers a broad range of topics and is full of helpful examples and practical tips. The authors have created a grounded and accessible resource for anyone who serves on a nonprofit board—and especially for those who are new to board service.

Rick Moyers
Vice President, Programs and Communications, Eugene and Agnes E. Meyer Foundation; Coauthor, Daring to Lead

One gem among countless practical, nitty-gritty pearls of wisdom in Susan and Bob’s insightful new book, Nonprofit Board Service for the GENIUS: “Finding the right board is akin to finding a spouse.” Their latest work is valuable reading for seasoned nonprofit veterans, diligent newcomers, and everyone in between!

Cynthia Remec
Executive Director, BoardAssist
Nonprofit Board Service

for the GENIUS

Susan Schaefer, CFRE
Bob Wittig, MBA

FOR THE GENIUS IN ALL OF US™
Publisher’s Acknowledgments

This book was produced by a team dedicated to excellence; please send your feedback to Editors@ForTheGENIUS.com.

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Susan co-edited The Nonprofit Consulting Playbook: Winning Strategies from 25 Leaders in the Field with Linda Lysakowski, and she was a contributing author to YOU and Your Nonprofit Board: Advice and Practical Tips from the Field’s Top Practitioners, Researchers, and Provocateurs.

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Bob has been a contributing editor to CharityChannel and was a contributing author to *YOU and Your Nonprofit Board: Advice and Practical Tips from the Field’s Top Practitioners, Researchers, and Provocateurs.*

Bob’s board service includes: founding board member of Mundo Verde Bilingual Public Charter School (treasurer); All Souls Church Unitarian (treasurer); Workforce Organizations for Regional Collaboration; and the Ross Elementary School PTA (treasurer).

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To those who prepared me well for board work: my parents, who set my values; my sister, Allison, ever in support of my mission; and my sons, Nathan and Jake, for helping me redefine my vision. And to Rob, whose support has sustained all of these things, and more.

Bob

To my mother, Margot, for always believing in me; my daughter, Kayla, for keeping me on my toes; Joan and David Maxwell for their support and guidance; and my friends and colleagues in the nonprofit sector whose commitment to making the world a better place inspires me.
Authors’ Acknowledgments

We want to thank the many nonprofit organizations and leaders whose experiences, successes, and struggles helped guide us with the development and writing of this book. They generously shared information, documents, and experiences, which makes this resource rich with real-life examples.

Next, a special thank you to our nonprofit colleagues who encouraged us to take on this project. Their enthusiasm helped keep us motivated throughout the writing and editing stages. We are deeply privileged and honored to have the opportunity to work in this sector and are grateful to have such supportive peers.

We also owe deep appreciation to our publisher, Stephen Nill, for giving us the opportunity to write this book, and our editing and production team, Linda Lysakowski, Lisa Sihvonen-Binder, Joy Metcalf, and Kim O’Reilly, for supplementing our sometimes-weary eyes.

The book’s content would not be as crisp or as thorough if not for the insights of three governance experts who put their all into its review: Rick Moyers, Maureen Robinson, and Fisher Howe. We could not have found a more astute team of readers.

We also relied on the following experts for their wisdom and insights: Anne Schrantz, Stephanie Gerard Cohn, Lisa Landmeier, Benjamin Takis, Marjorie Spitz Nagrotsky, Doug Harbit, and Andrea Walker.

A special thanks to our families and friends for their patience and support while we completed this project.

Finally, we want to applaud and acknowledge the many individuals who consider serving on boards and those who take the plunge. The dedication and oversight of committed board members make nonprofits more stable, sustainable, and impactful. The public depends on them as stewards of the mission and finances. It is our great hope that this book inspires committed and engaged board service.
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Part 1—Board Service with Your Eyes Wide Open ........ 1
We begin by helping you explore why you want to be on a board and what you can expect if you do decide to serve. This section provides a search framework to help find a board that is the best fit for you.

Chapter 1
Why Would Anyone Want to Serve on a Nonprofit Board? ............. 3
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Chapter 16
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equip you with the know-how you’ll need to improve and strengthen your board’s recruitment process.

**Chapter 17**  
**Orientation: An Essential Beginning**  
A well-thought-out orientation for new members helps reiterate expectations and gets everyone on the same page. When done right, it can become a key ingredient in helping novices acclimate quickly. This chapter covers the topics and strategies that can help bolster this important introductory period.

**Chapter 18**  
**Make Meetings Magical**  
Board meetings that are effective, efficient, and engaging keep members interested. This chapter focuses on ways to make your meetings meaningful, productive, and a good use of everyone’s scarce time.

**Part 5—The Care and Feeding of Your Leaders**  
While the executive director (ED) and board chair are two key positions, there’s a need for motivated leadership on many levels. This section explores how to support those in charge, develop and sustain a leadership pipeline, and what to do when someone at the helm vacates.

**Chapter 19**  
**ED–Chair Partnership: The Dynamic Duo**  
The partnership between the executive director and board chair is an essential ingredient for organizational success and board engagement. This chapter explores what makes this relationship so important, ways the ED and chair can partner and communicate, and what to do if things sour.
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Hiring and Firing the ED ..................................... 263
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What If Your Leaders Flee to Cancun? ......................... 275
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Whether your board is off-course or just in need of a push to achieve greater heights, it helps to know how to harness momentum toward the next great thing. We conclude with ideas about how to measure board performance, keep members engaged, and fix some of the most common board problems.

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Given that the board sits atop the nonprofit organizational chart, who looks at its performance? For better or worse, that is a job that members themselves must undertake. This chapter covers ways to evaluate board and individual member performance and how to use that information to improve board functioning.

Chapter 25
Keeping Board Members Engaged and Connected ............. 317

Maintaining an engaged and connected board takes perseverance and commitment. In this chapter, we identify early warning signs of a blasé board and discuss ways that individual board members can take charge and work to re-energize their peers.

Chapter 26
When Things Go Awry .................................. 329

Whether it’s a financial crisis, personality clashes, or the ubiquitous “difficult” member, your board service will, at some point, experience a hiccup. This chapter covers some of the more common challenges that confront boards and provides some antidotes to help resolve them.
Board work is a messy process largely because it involves human beings. Structure, procedures, and best practices are important but are useless if the board culture is dysfunctional. We close by exploring why board culture matters, how it impacts board experience, what influences it, and what you can do to change it for the better.
There are approximately 1.5 million nonprofit organizations in the US and, from the smallest to the largest, the one thing they all have in common is a governing board.

The need for committed and competent board members is large and unrelenting. When nonprofit leaders are not obsessing about fundraising, they are obsessing about where to find the next great board member. Ever optimistic, nonprofit leaders frequently hope to realize both goals simultaneously and efficiently by finding a board member who checks all the boxes—passionate, generous, and well connected—the “hat trick” of board recruitment.

While this feat is possible, it is far from common. Much more often, the search for good board members involves a steady continuum of effort to identify people who will add value, interest them in joining the board, and then cultivate the knowledge and commitment that will pay dividends in many forms. And when that is done, you get to do it again, and again. Cyril O. Houle, an early and influential writer on the subject of nonprofit governance, captured this effort perfectly when he observed, “a good board is a victory not a gift.” Given the effort involved, it is a good thing that the victory, when achieved, is so rewarding.

Most of the resources developed to help guide nonprofits through the board development process are intended primarily for executive directors and the valiant members of nominating committees who keep the process aloft and moving forward. Intended to help them see the process whole and guide them every step of the way, the perspective is typically that of the organization—what it needs from its board, what it should do to prepare, how it should manage the process, how new board members should ideally learn the ropes.

Susan Schaefer and Bob Wittig have done something different. Their book, *Nonprofit Board Service for the GENIUS*, has a different point of departure—the experience of the individual first invited to serve, then tasked with being effective. This book explores the experience of board service, the elements
of board development, and the practices that create good governance from that singular perspective. The book covers a lot of ground but the “voice,” the situations, and the good advice center on what an individual needs to do, or needs to help his or her colleagues do, to be as effective as possible.

Having spent a good part of my professional life trying to help organizations build the boards they need and deserve, I was relieved and delighted to find a resource that acknowledged from the start that a board begins with individuals who have said “yes” to the invitation to serve and have done it with their eyes and hearts open to what the work entails.

Susan and Bob respect the care and effort an organization has put into the process, even before an invitation is extended to a candidate, but they also understand that beyond the immediate honor of being asked there are many legitimate questions that an individual should ask before accepting, not to mention a little soul searching about fit, personal concerns, and commitment.

This book takes a prospective board candidate through the basics but also through the complete lifecycles of both a board and an organization. In saying “yes”, an individual could join a start-up organization with a founder-led board and, with the help of the book, be an effective part of a smooth transition to the board and the organization’s next stage of growth. At a different moment or in a different setting, the same individual could find herself in the middle of a leadership transition or on the cusp of a planning process and navigate both with care and confidence. Whatever the circumstances or the challenges, what this board member would always be is someone who is on the right board for the right reasons.

The book is not dogmatic; there are only a few issues on which there is only one answer or one way to go. But underpinning the span of topics the book addresses is a strong belief in the ethical dimension of board work and an equally strong belief in the fundamental goodwill that motivates people to serve. One reason board dysfunction is so demoralizing to experience and shocking to observe is the affront such behavior presents to our collective sense that the people who serve on nonprofit boards have an obligation to bring their best selves to the table.
Susan and Bob have drawn on their knowledge, beliefs, and experiences to write a comprehensive yet thoroughly accessible book that makes it clear that serving on a board is serious work but also a great privilege. In doing this, they encourage the kind of individual performances that add up to the collective power of a great board.

**Maureen K. Robinson**
Governance consultant and author of *Nonprofit Boards that Work: The End of One-Size-Fits-All Governance*
When you become a board member, you’re no ordinary volunteer. The role can bring to light previously unimagined skill sets and networks. It can provide profound joy over the social good you help create for your community. It also comes with its own set of legal and moral responsibilities. Sound overwhelming? It can be, but for the millions of people who find themselves governing nonprofit organizations, serving on a board can be an incredible journey—professionally, personally, and civically.

Many arrive at their first board meeting—or sometimes their twenty-first—unprepared. While there are some terrific resources out there, we craved a comprehensive one that provided the basics in a user-friendly format. We wanted to highlight a board member’s ups and downs honestly, in an accessible tone, sprinkled with a bit of humor. After all, those very traits define stellar boards we know: honest, accessible, fun.

Don’t get us wrong, board membership is serious business. But, we have found that many resources for new members are piecemeal or academic in their approach. This reference is designed to guide you through the process of searching for a board, your first year of membership, and beyond.

The two of us have studied boards by wearing many respective hats: Bob as nonprofit staffer, executive director (ED), and grant maker; Susan as staffer and nonprofit consultant. Both of us have served on multiple boards as members and officers. What bonded us over the subject of boards was a stint at an adult literacy organization in Washington, DC, where Bob was the ED and Susan held multiple board positions, including chair. As you may know, this ED and board chair partnership is a critical one. It can be stressful at times but also rewarding. Yes, we are still talking to each other many years later!

The board we served on together was evolving, efficient, and energizing. It took a lot of work from a lot of people to create a culture that worked well for the other board members, the staff, and the adult learners served by the organization. Since then, we have longed for a resource that mimics the kind of matter-of-fact conversations that we had at the time about the array of
topics that strengthen a board. As our respective careers have relied upon the sound workings of boards, we have remained steadfast in our desire to make the process of educating members as simple as possible.

**Why Is It So Critical to Learn about Board Membership?**

You are picking up this book at a pivotal time. While nonprofits tend to be viewed more favorably than the corporate and public sectors, there is plenty of skepticism to go around. Because of the special status bestowed on nonprofits by the government, the public tends to hold nonprofits to a higher standard: Consider the nonprofit executive who uses organizational funds to buy a fancy car for personal use rather than for providing food to homeless children. Especially in this age of new economic realities, quality boards can make or break a nonprofit organization. As scarce resources characterize nearly every institution, boards can provide human, financial, professional, and moral depth. We hope to portray a realistic view of board service, with all of the accompanying frustrations and joys.

This book is written for the millions of people who serve on boards or might want to. Along those lines, the book takes on the viewpoint of someone who is just beginning the nonprofit board adventure. We have structured it loosely from these perspectives:

- Candidate’s eye view
- New board member’s eye view
- Veteran or leader’s eye view

If you are considering board service, we hope this book will help guide you through the process of deciding whether or not this is the best way to serve. If you’ve just joined a board, we hope that this book will help get you off to a great start. And if you have some experience under your belt but your service is less than satisfactory, we hope this book will help get you back on track by providing some suggestions and insights on how to improve board operations and how you as an individual member might engage differently.
Nonprofit board service is a broad topic. Deciding which elements to focus on and in what level of detail was no easy task. However, based on our collective experience of working with hundreds of nonprofits and surveys with those in the field, we believe this book covers content that many nonprofit board members need to know, and will find important and useful.

How Can You Get the Most Out of This Book?

Board service is not necessarily rocket science but it’s no cakewalk either! To help you get a good grounding, we begin by helping you determine whether this is a worthy pursuit for you and move sequentially through the stages of nomination, early candidacy, and advanced topics:

- **Part 1** helps you assess whether board service is right for you and how to find a personally suitable organization.

- **Part 2** identifies areas that will prepare you for your first board meeting.

- **Part 3** homes in on the topics that will form the basis of most of your board-level discussions.

- **Part 4** takes you behind the scenes of your board meetings and shares the factors that influence the quality of your board’s functioning.

- **Part 5** shines a light on the many leadership factors that influence boards.

- **Part 6** provides an advanced look at how to push your board to the next level.

While we would love it if everyone read this book from cover to cover, it’s designed to be read in pieces. If you’re a new or inquiring member, you’ll likely want to focus most of your attention on the first three parts. If you’re already on a board, you might be most interested in Parts 4 through 6. Or, if you are like many board members, having begun your service without much formal preparation, you might look to Parts 2 and 3 to review the basics.
As you learn or refresh your skill sets, we hope you come away with the understanding that no board is perfect. And, you don’t need to be the chair to make positive change. Every member has a powerful contribution to make. You don’t have to be a star in every arena, but grab an issue or two and make it happen! Throughout the book, we provide examples of inspiration or even genius from real organizations (names have been changed to protect the innocent!). We also alert you to what hasn’t worked so well and what to avoid. All of these vignettes are designed to show that board work can be a messy process and that you can be creative and take measured risks.

We also provide several document templates that might benefit your board. Encourage yours to revise or adapt our samples, so you don’t have to start from scratch.

A few more tips to keep in mind:

- There are many different kinds of nonprofit agencies. Our focus is primarily those that are tax-exempt, 501(c)(3) organizations.
- The information here is geared toward those who oversee small and mid-sized organizations, those that make up the majority of the nonprofit sector. That said, larger organizations could also benefit from most of the information.
- We use the term executive director (ED) to refer to the staff leader. While organizations may refer to their leaders by many different names, we have chosen to use ED because of its popularity among small and mid-sized nonprofits, which make up the bulk of organizations in this country.

No book of reasonable length could cover all of the details you need to know in depth. We have attempted to cover the most relevant and pragmatic information that comes across most board members’ desks. Use the material here as a basis for questions and further reading. If your board has done little in the way of formally orienting its members, consider asking everyone to read select chapters for group discussion. That’s one way of raising the bar and providing the kind of continuous improvement we advocate. There’s no
better way for you and your peers to bond and strengthen the organization you love.

Boards do serious work and have important responsibilities. Yet you can, and should, have fun as a board member. We hope this book’s spirited tone will follow you to the boardroom.

For more information and additional resources, go to nonprofitboardgenius.com.

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The Care and Feeding of Your Leaders

No matter how stellar your board members, they rarely thrive as a group without an equally stellar group of leaders. This section will focus on those with the most influence: the chair, the ED, and your founder. All of them play different roles in nurturing the development of your board, so we will explore their roles in molding the team. Even if you are not (yet!) an official leader, we have sprinkled throughout this chapter ways in which you can help prod your current leadership toward a position of strength or develop a culture of leadership.

What happens when key leaders fly the coop? Whether they resign peacefully, involuntarily, or in a dramatic scene worthy of an Oscar, it will be your job, in part, to foster stability. So, we will touch on strategies that revolve around hiring, retaining, firing, and planning for that next great leader. When it’s all over, our hope is that you will come away appreciating just how important these board dignitaries are—and why it’s critical to select the right ones.
As two who served as leaders for the same organization (Bob as executive director, Susan as chair), we understand very well the delicate dance these choreographers must stage. And, we are convinced that the ED-chair partnership is often the key ingredient that drives overall board engagement. It also sets the tone between staff and board. We are strong believers that a chair’s commitment increasingly drives a board’s work. At the same time, the ED’s engagement with that chair ensures that the board’s work is informed.
This is a partnership that requires high confidence, transparency, respect, and communication. Hopefully, the two leaders like one another! If not, a professional relationship must prevail. Anything less will affect the organization. After all, this pair is responsible for orchestrating a body of people devoid of many formal rules, required goals, or often, well-defined roles. That means it’s up to this duo to set the tone for nearly all of the board’s achievements.

**Why Is the ED-Chair Relationship So Crucial?**

A strong ED-chair partnership bolsters board performance and long-term organizational stability. Why? Each leader relies on the other for support and ideas, and neither wastes time looking to evade the other when critical events arise. Instead, issues quickly get airtime, and the players find solutions. This reliance enables the organization to weather storms with greater speed and tact than tends to be the case when the board operates in a separate realm from the ED.

This pairing is doubly vital because the board chair serves as the *de facto* boss of the ED. While legally, the full board supervises the executive director, it is not realistic for the executive director to report to a dozen “bosses,” which leads to the chair’s practical role as primary liaison between the ED and board.

The ED-chair roles can appear well defined:

- The chair leads the board and ensures that it is well managed and motivated.
- The ED leads the staff and ensures that it is well managed and motivated.
- The chair and ED work together to lead the nonprofit enterprise.

Human nature complicates these simple equations. Personalities can quickly deteriorate any one of the elements above, creating a ripple effect that can adversely impact the entire organization. The human factor can even disrupt events if the chair and ED are otherwise doing the right thing. It’s like baking
a cake: You can have all the right ingredients, but if you bake the cake at the wrong temperature, your prized dessert is toast. The “wrong temperature” in this case might indeed have to do with overheated personalities. Or distrust. Or egos. Or lack of communication. Or divergent priorities.

What Makes for a Strong ED-Chair Relationship?

In most nonprofits, there is a gap between what board members know and the realities of the day-to-day operations. Unless the board is running the organization without staff, it is virtually impossible for these part-time volunteers to know in detail what is happening day-to-day. Members rely on selected information provided by the executive director. While the board does not need to know every minute detail, it does require an intelligent staff “filter” that knows the information best suited for board meetings.

The ED-chair relationship is a bridge that helps close this information gap. The chair often serves as a testing ground for the ED. If the two believe that an issue requires a larger discussion, they will raise it with a committee or the full board. When the board learns what it needs to learn, when it needs to learn it, the resulting synergy transfers to the staff, other stakeholders, and even the mission.

Information Funnel

An important aspect of the ED-chair relationship is deciding what to share with the entire board. Usually, there’s way more information and data available than needed for effective oversight. The leadership duo must decide which relevant information should be funneled through to the board’s collective brain for review. Too much could result in information overload and possibly confusion. Too little could result in poor decision making or lackluster governance. The goal is to provide just the right amount to support informed decision making. Funneling information is a delicate balancing act indeed!
The ED and chair must work together in many ways to provide a comprehensive yet manageable set of issues and data that inform the board’s work. They must also work to build goodwill between them. The organization relies on this dynamic duo to have their fingers on the pulse of the organization, allowing them to strategically bring new issues and challenges to the board for input and support. Their partnership has both practical and relational aspects to it. The practical parts include:

Information needed. The board defines a set of baseline data that it requires from the executive director on a regular basis, usually during the lead-up to its meetings. This data helps members fulfill their oversight roles. The board chair must believe that the ED is being fully transparent with the chair and, in turn, with the entire board.

Information shared. The ED provides that data and key strategic information, as well as questions that require board input and decisions. These will vary over time. The board chair helps prioritize which issues will come before the entire board.

Strategy. The chair and ED need to work together to frame the strategic issues and goals that will steer the board (and staff) in the same direction and provide measurable criteria to assess progress. These are ideally board-approved goals established during some kind of planning process; however, it is not uncommon for new issues to emerge. See Chapter 9 for guidance on strategic planning options.

Board operations. Ultimately, the chair is responsible for overseeing board operations. One major exception comes in creating the meeting agenda. That document represents the collective efforts of the ED
as well. The two work together to create an interesting, thought-provoking, discussion-generating meeting. See Chapter 18 for more details.

The relational pieces are equally important, and if not present, can be the undoing of this key partnership:

- **Trust.** The chair must trust that the ED is forthright and that there will be no surprises. Ethics and honesty is a two-way street: The ED must trust that the chair provides a safety net, so that if something goes wrong (unless it’s something unethical), the chair will rally the board to resolve the issue.

- **Accountability.** The chair must not only strive to partner effectively with the ED but must also hold the executive accountable—and do so in a respectful, thoughtful manner. The ED, then, has a right to expect that the chair will hold the full board and its individual members accountable.

- **Mission.** With mission at the core of this relationship, the parties gain valuable perspective when navigating issues together.

Communication is both practical and relational in nature. The practical piece includes the information supplied by the executive director, as required to the board. The relational piece will vary by style and personality. For example, one board chair might suggest weekly phone conversations with the ED. The next might prefer monthly or as-needed meetings. However the communication happens, it must meet the needs of both the ED and the chair.

### How Can the Chair’s Role Impact the ED?

Many board leaders are comfortable taking a back seat to their EDs a good deal of the time. While executive directors’ perspectives are important—and are often more informed than those of their chairs—it is a chair’s duty to listen to the chief staffer’s opinions and use them to propel the board’s work. Our goal here is not to diminish the ED, who clearly plays a central role in every nonprofit, but to focus on how the chair can best leverage that leadership position. After all, as the leader of the board and the main board
liaison to staff, the chair plays an influential role in the relationship between the organization’s two key leaders. By performing the following duties well, the chair stands to gain the ED’s trust and confidence, primarily through these tasks:

- Facilitating well-run meetings
- Setting organizational priorities in tandem with the executive
- Recruiting competent, motivated board members
- Holding individual board members accountable
- Ensuring that committees are engaged and functioning
- Mediating conflict among members, either alone or by involving other relevant parties
- Serving as a spokesperson to the greater community
- Guiding the board through crises
- Leading the hiring, evaluation, and firing of the ED

Performing the above duties requires time, commitment, energy, and perseverance. If done well, the result is a strong partnership with the ED that benefits the entire organization.

But, we saved the most important—and one of the most overlooked—duties of the board chair for last: supporting the ED. This role will vary from one organization to the next, but it typically involves ensuring that the ED is being recognized and nurtured. Realizing that the ED job can seem like a nonstop treadmill at full speed, the chair can be the ED’s biggest fan and cheerleader! Chapter 20 includes more detailed suggestions and strategies on how the chair (and board) can support the ED. Often, the board follows the chair’s leadership on this front, so sometimes even a few laudatory words or a token gift given in public can reenergize an ED’s fatigued mindset.
How Can the ED Help Lead the Board?

In our experience, highly engaged boards have this ingredient in common: focused ED leadership. EDs as board leaders keep the board—and especially the chair—focused on attainment of the mission and vision. While the chair may well top the organizational chart, we have come to learn that the ED of a well-functioning nonprofit takes top billing in what we’ll call a “leadership chart.” There’s little denying that EDs must nudge, direct, and cajole the workings of the board in order for management and governance to work seamlessly together.

That doesn’t mean that the ED should be the most vocal person at board meetings or that this leader’s presence is necessary at every board-level conversation. It does mean that an ED must intentionally work to lead this high-level volunteer group. Otherwise, the board can become directionless, uninspired, and disengaged.

Board members can be quick to define their EDs as either overwhelming the board or being largely absent, providing no focused leadership or guidance. Clearly, neither is healthy for the organization. There is a sweet spot in between these extremes that most often enables a solid, respectful working relationship between staff and board. What are the appropriate tasks for an ED who is seeking to strengthen the board?

Illuminate the Mission and Vision

You already know that the ED conveys the vision. What you might not have thought about is just how much that role can influence a board. The ED’s passion for, and communication of, a clear vision reminds members why their focus should be strategic and long-term. And, when the ED regularly illuminates the mission, it often translates into greater board dedication.

Sometimes, these tasks can be accomplished in the boardroom, through mission moments and discussions about the external environment. Other times, they can go further: The ED of a watchdog group set up a pen pal program between board members and those who had been affected by the nonprofit’s work. That experience gave them a greater understanding of the impact of that group’s work. Another ED strategically schedules
meetings with board members when program beneficiaries will be in the building, giving board members a chance to experience the energy of the organization’s programs. Other leaders create presentations, share articles, or tell stories that get the board out of the everyday and enable them to see the bigger picture.

**Steer the Board’s Focus**

Most EDs help prepare for board meetings. They compile board packets, help develop agendas, schedule committee meetings, and provide financial information. These tasks certainly keep a board moving in the right direction. They also create the foundation for an ED and chair’s work of setting goals and expectations. For instance, each board agenda illustrates the issues delegated to the board under its full authority, versus those that the ED and chair might handle independently or send to committees. If the two players are systematic about delegating work, the bleeding boundaries that plague many nonprofits can quickly diminish.

**Help Direct the Leadership Pipeline**

Because the relationship with the board chair is so vital to the executive director, the ED has every right to play a part in selecting the next board leader. This process often begins many steps earlier, when the ED plays a role in developing a leadership pipeline for the board. The executive might suggest preferences for board seats, committee and officer leadership, and the chair. Of course, it is the board that votes on the final candidates, but the nominating or governance committee can work closely with the ED to ensure that candidates are acceptable to the person who will work with them most.
Great EDs know when to actively lead their boards and when to let their boards lead. They recognize the skills board members bring and when to tap into those volunteers. How do they gain these insights? In part, they pursue relationships with individual board members. It may seem an impossible goal, but it’s worthwhile for EDs to attempt to meet with each board member annually.

A board can expect and even encourage the executive director to provide it with key leadership, motivation, and support. In fact, for many engaged boards, a visionary ED is an essential ingredient.

It is increasingly common for EDs to serve as nonvoting, ex officio members of boards. This structure can bridge the divide between board and ED by legitimately giving the staff leader a seat at the board table.

**What If the Relationship Takes a Turn for the Worse?**

The likelihood of the ED-chair relationship souring is real. One reason is that, in many organizations, the chair position changes every year or two. Each new one presents a host of adjustments for an already-busy ED. The chair must also adjust when the ED retires, resigns, or even gets fired. Sometimes, one leader or the other remains in the position too long, leading to a feeling of complacency or entitlement. Add to these scenarios any crises that stand to strain the relationship, and you’ve got a very fluid set of circumstances.

If the ED-chair relationship takes a turn for the worse, hopefully the two parties can have an honest conversation about what has gone amok and the steps that might get them back on track. If the two cannot broker those negotiations themselves, select board members might step in, since an unproductive leadership team directly impacts the board itself. If the situation cannot be resolved internally, it might be necessary to bring in an outside mediator or board consultant to get everyone back on track. Many leadership coaches specialize in getting organizational heads to think through new approaches to their work.
It’s typically worth the effort to strengthen even a tottering ED-chair relationship. While a board can plod along for months or even years with a disgruntled leadership duo, it often takes a simple intervention or some professional development to bring the two together and recognize their collective strengths. Those assets are multiplied many times over when they feed board and staff morale.

To Summarize...

- An effective ED-chair relationship requires high confidence, transparency, respect, and communication.
- The chair is the board leader, and the ED is the staff leader.
- The ED-chair relationship directly affects how well the board functions.
- The executive director deserves input about the next board chair.
- If this relationship struggles or sours, it’s important to take steps to get it back on track.
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