

BoardSource

Board Chair – CEO Partnership: The Human Factor

It's real people — with their individual strengths, weaknesses, and interpersonal styles — who bring an organization to life and affect its ability to succeed. And real people who serve as board chairs and CEOs. When attentive to their human factor as individuals and as partners, great things can happen; when inattentive, dysfunction will likely follow.

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What makes for a great organization? For nonprofits, greatness translates into accomplishing mission within the context of limited resources, embracing opportunities, thwarting threats, building strengths, and confronting challenges. Of course, an organization itself does not possess this ability. An organization is an object, an entity. It's people who bring an organization to life, who define it as one that can — or cannot — maximize its mission-driven impact. Organizations need people with the right skills, knowledge, and synergy to accomplish greatness. This is the human factor.

An organization's human factor is embedded in the leadership of the chief executive and board chair, and it must be mobilized within these two individuals before it can be harnessed in others. To move a nonprofit forward through changing social, political, and economic conditions, it requires a board chair and a chief executive who

- take assertive stands and are intentional in the context of what's best for the organization
- are willing to take responsibility and operationalize the proverbial "The Buck Stops Here"
- have vision and purpose in the context of organizational needs
- have passion and commitment to the organization and to bringing this out in others
- are inclusive and make/facilitate decisions based on a diversity of voices
- have the ability to harness the human dynamics that affect organizational process and, consequently, organizational outcomes
- are both teachers and students of leadership, management, and governance

Great organizations have board chairs and chief executives who lead and take responsibility on the one hand and embrace inclusiveness, delegate, and empower others to have a voice on the other hand – all in the context of serving the organization.

Use of Self

The first step in building strong governance and management leadership combines two parallel tasks for both the board chair and the chief executive:

1. Understand your job description.
2. Know thyself.

A clear job description provides a starting point for understanding the responsibilities and tasks at hand. How you execute these responsibilities and tasks depends on who you are – your values, preferences, traits, attitudes, biases, interests, expertise, skills, and knowledge. Self-awareness of who you are and how its applied in your interactions with others is *use of self* – a concept that acknowledges the uniqueness of each individual.

When executing either the management or governance leadership role, you merge the respective job description with your personality and interpersonal style. Even with the exact same job description, no two individuals execute their respective role and responsibilities in the same way. The differences in execution can be attributed to how you operationalize your “human factor.” The goal is to find the balance between the personal and the professional while avoiding emphasis on one or the other that in either extreme can lead to dysfunction in your role execution – being too relaxed and too personal vs. being too rigid and too professional.

Let’s meet a few board chairs and chief executives who are struggling with balance. You might relate to the scenarios:

- Joe is an experienced board member, a friendly guy, and a strong ambassador for his organization. Now, as board chair, he is content with having the chief executive take the lead in most governance tasks, to the chagrin of the chief executive and other board members. Joe’s laid-back demeanor is getting in the way of executing the responsibilities of his board chair role.
- Julie, a chief executive, has had several successes in her role, especially around fundraising, but she doesn’t assert herself in challenging situations. She is allowing her non-confrontational personality trait to dictate her management behavior.
- Kyle, another chief executive, is all-business. He is known for making quick and firm decisions, often without consulting others. His assuredness and inflexibility is alienating staff members and affecting their productivity.
- Pablo, a new board chair, wants to expand the board’s role to include conducting performance evaluations for all key staff members.
- Connie, a chief executive, has created the board meeting agendas for her board chairs for years. When Steve, the new board chair, questions her about this task, Connie suggests that board chairs are too busy to be bothered with meeting agendas so she is actually helping him.

As board chairs and chief executives find their own role execution balance, they also must work together to create a professional partnership. Parallel leadership is not enough to guide an organization forward. It’s the partnership of the board chair and the chief executive that promotes organizational greatness . . . or not. One hopes that there is a good, natural “fit” between the two individuals to serve as a base, but this is not

always the case, and both partners are challenged to work hard to create a functional working relationship.

The greater challenge for a chief executive is the one-to-three year cycle of having to establish a new relationship with a new board chair. This requires flexibility and openness to what a new individual brings to the board chair role. Ultimately, this creates a synergy different from the last partnership, and, hopefully, one that is enveloped in the context of appropriate management and governance roles and responsibilities. No micro-managing – as Pablo is suggesting – and no micro-governing, as Connie is used to!

As stated in *The Board Chair Handbook*, the relationship between the board chair and chief executive should be based on three principles, each of which needs to be consciously applied to support the development of a strong partnership:

- mutual respect, trust, and support for each other and the partnership
- reciprocal communications
- shared purpose and mission-driven

A primary challenge in building this partnership is each individual's personal and professional biases and preferences in trying to define the partnership. Again, it's important to strike a balance between the two extremes – between being too relaxed and being too rigid. Remember, you are partners working toward a shared purpose.

Chief executives and board chairs have separate and shared tasks related to management and governance. Articulate the shared tasks, particularly around fundraising and resource development, along with a plan for operationalizing them. Both of you must understand how each one of you contributes to the shared tasks, placing emphasis on your respective role execution around these tasks. Even chief executives who have longevity in an organization must have these discussions with each new board chair. Don't make any assumptions as to who should do what based on past experiences or perceptions (as Connie did).

The partnership of the chief executive and board chair is a means to an end. It provides a structure to a process for accomplishing tasks. Governance and management complement and support each other – both focus on mission, but through different

perspectives and actions. The right hand needs to know what the left hand is doing and vice versa. Therefore, the partnership is critical in providing a communications headquarters for sharing information, addressing issues, and planning next steps appropriate to governance's and management's separate and collective responsibilities.

Practicing Social Stewardship

While the human factor begins with the board chair and chief executive, it extends to all other staff and board members. Inherent in the chief executive and board chair roles is the responsibility for social stewardship, for overseeing and supporting staff and board members and their working relationships in the context of organizational mission and doing what's best for the good of the organization.

This scenario provides an example:

Bill, a board member, and Tyler, a fund development associate, have been asked to plan a fundraising event. Bill, who is a take-charge type person, begins to do just that. After two planning meetings, Tyler complains to the development director that he has no input into the event and indicates that Bill is making decisions without any concern for the impact on the nonprofit's costs, resources, and time. Bill seems to think that Tyler is there to listen and take notes. The development director then discusses the situation with the chief executive, who in turn shares it with the board chair. The chair meets with Bill to get his take on how the planning for the fundraiser is going and to explain the role of the staff development associate and how important it is for Bill to partner in this task.

Lesson learned:

Each person has specific responsibilities and discussing who does what needs to happen at the beginning and at intervals to check that the partnership is functioning appropriately in accomplishing the task. By attending to the human factor, you acknowledge that how individuals carry out their responsibilities impacts mission outcomes.

Author Jim Collins writes about the importance of "getting the right people on the bus." However, the work for the chief executive and board chair does not end there; in fact, it is just beginning. Social stewardship recognizes that each individual working in any capacity for an organization should embrace a balanced role execution and be given

tools and support for achieving this balance. Having a clear job description and balancing it with one's personality, interests, expertise, and interpersonal style provides the necessary foundation for organizational greatness.

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Resources: The Board Chair Handbook, Building the Governance Partnership: The Chief Executive's Guide to Getting the Best from the Board