



A self-assessment tool for thinking strategically about how well you relate to your volunteer leaders.

# STAYING ON BOARD

IS YOUR RELATIONSHIP WITH YOUR BOARD DYNAMIC OR DYSFUNCTIONAL? Are you a manager or a motivator? When was the last time you took an honest look at how well you relate to your board? If you're even a little unsure of the answers to these questions, it may be time to find out just how well your board barometer is working.

ASSOCIATION MANAGEMENT asked a small group of board relations experts to identify the top five strategic areas that affect the success of boards and to discuss how the CEO sets the tone for addressing these areas. Following is an overview of the areas on which they focused: vision, communication, training, roles and responsibilities, and performance and expectations. Some of these may be more or less critical to you than others, depending on how you rate your board relations skills.

EDITED BY APRYL MOTLEY

## Vision

Our group identified vision as the most important area that you should focus on in building a relationship with your board, particularly with your board chair.

Ideally, the CEO and the chair will begin their relationship with a clear understanding of how they will

work together during the chief elected officer's term. "The CEO and the chair must be on the same page," says Marshall Brown, president of Marshall Brown and Associates, Washington, D.C. "They might differ on how they turn the page, but they must have a similar vision for the organization." In her work with

boards, Jean Block, president of Jean Block Consulting, Inc., Albuquerque, New Mexico, always recommends a face-to-face meeting between the CEO and chair early in the term, so that they can decide how they are going to operate in the year ahead.

Carter McNamara of Authenticity Consulting, Minneapolis, takes the concept of vision a step further when he suggests that "the CEO often has to take the lead and have a vision of what a good board would look like." He continues, "The first thing the CEO has to decide is that he or she wants a good board. When CEOs complain about boards, sometimes it's because they don't *want* to have a good board supervising their work." Clearly, a good relationship with your board begins in the spirit of partnership and a shared vision.

# BOARD RELATIONSHIP ASSESSMENT

Here are some key questions you might ask yourself as you evaluate your relationship with your board members and chair:

## CLARIFYING VISION

- How will my chair and I operate this year, and what will success look like in 12 months?
- How have I established the rules of engagement in the past?
- How was this tied to our strategic plan?
- Do I understand what motivates my volunteer leaders and how they would like their work recognized?

## ESTABLISHING EFFECTIVE COMMUNICATION

- Do I understand how best to communicate with my volunteer leaders?
- How do I manage different communication styles?
- How do I avoid pitfalls in communicating with volunteers?
- Do I have a system in place for regular communication with my board?
- What types of information do I think are important to communicate on a regular basis?

## ENSURING SUFFICIENT TRAINING

- Have I invested sufficient time and resources in training my board members?
- What training or orientation program is in place?
- What kinds of training do I need to provide for the entire board versus my new board members?

## DETERMINING ROLES AND RESPONSIBILITIES

- What have I done to ensure that the roles and responsibilities of the chair are clear and meaningful?
- Are my staff and volunteers clear on who does what, when?
- Have I established a clear chain of command for staff and volunteers to follow?

## UNDERSTANDING PERFORMANCE AND EXPECTATIONS

- Do I have a good understanding of my board's expectations and how my performance will be evaluated?
- What specific goals did the board and I agree upon?
- How (and when) are they being measured and discussed?
- What relevant information should I communicate to the board relative to my performance, and how should I communicate it?

## Communication

Even with a shared vision in place, without consistent and meaningful communication, you will find it difficult to build a positive relationship with your board. To be effective, your volunteers need information tailored to their roles as members of the board of directors. "To have a strong board, the chief executive has to do a lot of very hard work to keep board members informed and to maintain a two-way flow of information," says Theresa L. Garcia, CEO of Trust, Leadership, and Growth, LLC, Carefree, Arizona.

A portion of this work is understanding how your board members prefer to communicate. "A CEO would be smart to have an open dialogue with the chair about how he or she likes to communicate—whether by phone, e-mail, or in person," says Brown. Find out what kinds of information your chair and board members expect to receive and then determine the best way to provide it to them. Many organizations post board materials to dedicated areas of their Web sites so that their boards have easy access to any pertinent documents ranging from the strategic plan to the minutes from the last board meeting.

## Training

Ask yourself: “How skilled is the board of directors in knowing its roles and responsibilities?” recommends Annette E. Petrick, CAE, president of Petrick Outsourcing Unlimited, Inc., Woodstock, Virginia. It’s important not to assume that your volunteers know how to run an association. While they bring functional knowledge of your industry or profession and other valuable skills to the table, your board members still require training.

“It’s our fault if we didn’t give board members what they need to be successful,” says Block. She believes that many errors of the “we just didn’t know any better” variety can be avoided by providing board members with appropriate training.

Keep in mind that some veteran board members may feel that they do not need any additional training. But you should firmly suggest that they participate. “When I work with a board, I make sure that all the members know that we’ll be having a one-hour refresher course—in addition to a separate orientation and training for new board members—for *everyone* to review their roles and responsibilities,” says McNamara. Although some veteran members may be initially resistant, most board members leave training energized and more confident about the work that lies ahead of them.

## Roles and responsibilities

One of the key areas that you’ll address during training is what’s expected of each board member during his or her term. Dealing with the issue of “how well the board understands the veil between leadership responsibilities and staff responsibilities is critical,” says Petrick. Many boards create and distribute job descriptions for the chief staff executive, the chair, and board members. “Giving everyone a job description is one of the best ways to avoid confusion about who does what,” says Block.

Beyond understanding specific duties and functions, at the founda-

tion of your relationship with your board, there must be trust. “Board members must feel that they are trusted, but they must also trust the CEO,” says Garcia. “Mutual trust increases board effectiveness by allowing the board to fully focus on its role as organization steward and support you as the sole operational authority, accountable for staff, operational achievement, and conduct. To build trust, you must consistently demonstrate full trust in the board. You do this by fully disclosing all pertinent information, especially in controversial matters. Above all, your actions consistently demonstrate an unwavering pursuit of the mission.”

## Performance and expectations

Ultimately, the success of your board in the areas addressed earlier equates to the success of your organization. And you will be evaluated in part on how well you are able to work with your board to achieve the goals and mission of the organization. “If everyone on the board has bought into the strategic plan and agreed-upon goals, there shouldn’t be any surprises at evaluation time,” says Marshall Brown.

Make sure that you understand your board’s expectations of you. You *and* your board should set goals and benchmarks that serve as the basis of your evaluation. However, in doing so, you also want to remain focused on the big picture. “The board and the CEO should feel good about what they’ve accomplished. When they look at the big picture, they often see how much they’ve really done together. It’s important to have a sense of proportion,” says McNamara.

## Real-world experiences

How do these five areas play out in the real world of association management? We asked three CEOs to describe their relationships with their boards in these five strategic areas. What follows are their accounts. ►

# OUR EXPERTS

Collectively our experts have several decades of experience working with CEOs and association boards to help them be more productive and successful in their work.



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