

Staff As the Secret to Board Success
Sonia Stamm, boardeffect.com
October 13, 2015

According to [Jan Masaoka](#), Director and Editor-in-Chief of *Blue Avocado*, some chief executives feel that independent board-staff interaction undermines their authority and creates the potential for staff to provide the board with misinformation. Similarly, they might be concerned that board members will inadvertently leak inappropriate information to staff (ie. lawsuit settlements or staff raises/cuts).

While board members want to abide by their chief executives' wishes, they might appreciate the efficiency of meeting with staff on certain occasions. The CFO and Board Treasurer, for instance, have obvious reason to collaborate and might be able to spare the CEO another meeting. As Masaoka points out, that situation can afford the board an independent perspective on information that is not filtered through the CEO. Conversely, when that board-staff interaction is forbidden, the board might be the last to know about serious financial, legal, or public relations matters.

Assuming there is mutual trust between the board and CEO, it's still important to delineate the roles of staff in dealing with the board. Staff might be invited to present at board meetings or simply attend to respond to questions. Restricting board-staff exposure to one another can do a disservice to each, as they won't benefit from seeing each other's work.

The following is a summary of Masaoka's suggested guidelines for clarifying board-staff contact:

- No restrictions on board-staff contact, but the CEO should be informed about meetings.
- No need for CEO to attend every meeting that involves board and staff (ie. annual fundraising gala), but all parties should keep discussions within bounds
- Board members can request information and reports that exist, but may not direct staff to create reports or perform other tasks – such requests should be channeled through the CEO.
- The board should create policies and mechanisms for addressing personnel grievances (as well as organizational irregularities) and board members must direct staff to proper channels.
- The board should create and enforce a whistleblower policy to protect staff and to comply with federal law.

Some chief executives actively embrace the idea of board-staff collaboration. According to a blogger with [NonProfit PRO](#), the better they understand one another's role, the more effective each will be in achieving organizational success. Of course, the "staff" referenced in most of the literature on the subject are at the executive and management levels. But what about those likely to have the most frequent contact with board members – or at least board member activities and information? The administrative staff of an organization almost always plays a key role in the board function.

A list of 10 points offered by the NonProfit PRO blogger illustrates how staff – seemingly at every level — can support board members:

1. Pay attention to details of meetings as well as the needs of board members and inform board members in a timely fashion.
2. Provide adequate preparation for meetings in which board members play a leadership role.
3. Provide complex, concise and accurate information as requested.
4. Assist board members in personal solicitations when encouraged.
5. Use board members' time judiciously.
6. Meet agreed upon deadlines, and notify board members promptly if deadlines cannot be met.
7. Provide prompt response to requests for information.
8. Demonstrate candor, respect and transparency in relationships.
9. Provide opportunities for board members to be exposed to institutional activities and programs.
10. Seek advice, test for feedback, support fully and know how your volunteers can bring their expertise to the table.

Working together, the executive staff, administrative support team, and program staff can greatly influence board members' experience, as well as their own. As the author acknowledges, "board relationships can be totally rewarding or extremely frustrating" from a staff perspective. Organizational success depends upon the ability of the board and staff to work as a team.

It's important to consider what role administrative staff plays in ensuring board success, as they are essential to the board function. And so much of what the chief executive contributes to the equation happens through administrative governance professional.

The “top ten” list above speaks not only to what staff can contribute to board success, but it also aligns with ways in which board management software can be useful.

Sonia J. Stamm

Sonia J. Stamm is Governance Consultant at BoardEffect. Since almost our inception, she has shared a best practice perspective on governance with our team and clients, partnering to guide boards toward optimal implementation of our software. As founder and principal of a nonprofit leadership consulting firm, Sonia supports the evolution of mission-based organizations through her work in [board development](#), leadership transition and succession, and organizational effectiveness. A seasoned facilitator, trainer, and consultant, she enjoys guiding boards and organizations through critical junctures in their development.