

## Relationships Make for Success

By Louis M. Markwith, Vice President

Every nonprofit business understands that to be successful it must maintain solid relations with its individual donors. These relationships are the key to insure funding flows regularly and in sufficient amounts to continue and expand programs critical to serving your clients.

It seems nonprofits fall down on the relationships that are critical to the overall success. These relationships are those that help the organization run smoothly and insure that services are delivered; that Board members are engaged; that staff is motivated and rewarded; and the CEO and Board Chair have a positive open relationship.

In previous articles in the Nonprofit Companion, I have written about the first three in some depth. The matter of the relationship between the CEO and Board Chair is too often “assumed”, but not practiced as it should be. I speak from experience both as a former CEO and former Board Chair. As in any relationship, effort is required on both sides. The CEO must understand the role of a Volunteer Chair and the time demands that are placed upon that individual outside of his, or her, service to the nonprofit. The Chair must appreciate the pressures the CEO faces in balancing the demands of a service organization that has a variety of constituents: clients, donors, Board, staff and regulatory entities that have direct impact.

While the CEO may have an effective relationship with an individual Board member, the relationship changes when the Board member assumes the role of Chair. The expectations may change without any recognition from either party until there is an unexpected conflict or crisis. The best way to avoid these situations is to address the potential before it become a reality. When I served as the Vice President of University Relations at Gallaudet and Longwood, I learned valuable lesson about in parent-child relations that helped me as a parent and administrator. We worked with parents at orientation attempting to prepare them for the changes that would occur in their child’s life as the child left home and became a college student. This is a happy and exciting time and, also a tense time, as the life of the family changes as one of its member’s leaves. **The lesson** is to talk about those things that will change before the change occurs. It may not resolve the situation, but it will make the discussion much easier and productive when a resolution is needed.

Let’s talk about the CEO and what actions should be considered.

- Before the change occurs, have a “meet and greet” with the Board Chair’s key staff. The purpose is to learn which person is the main gatekeeper to the new Chair. It is important for the people supporting the Board Chair to understand the organization

where he, or she, has chosen to devote a part of their limited time. The board chair's people will appreciate being informed because you will be impacting their lives as well. Also, CEO hopes for recognition when a call to the office is necessary. Get names and try over time to learn something personal about the gatekeeper that will solidify the relationship. Continue to develop the relationship over time; a quick lunch or a thankyou card can help.

- The New Board Chair's family or other key relationships are a key to communication success. Learn about a spouse or significant other. This person may attend functions of your organization. Your organization is potentially taking some, otherwise, free time from the family. It is important they be recognized as an important part of the Board Chair's life. Get details about family members, birth dates, anniversaries, where a child is attending college. Make frequent inquiries about the family. This can be an important pressure point for the Board Chair. Pay attention to that significant person when they are attending a function.
- Have an open discussion with the Board Chair about communication style. Do not assume the style of the outgoing Chair is the same. Ask detailed question regarding the preferred method of communication. Determine how you will communicate in a crisis-email, phone text, or other. Determine the Board Chair's comfort level in leaving routine messages with staff or family (never assume the message was delivered, always check later).
- Discuss communication with other board members. The CEO is the chief staff person to the Board of Trustees (Directors), but is Chair's Board. Insure there is an understanding about regular communication, and how sensitive material will be handled.
- Plan, together, calendar's related to board activity and major organization events for at least a year. Do not surprise the Board Chair. Board meetings, Retreats, Donor Functions, and other significant operational dates need to be coordinated. Then share the important dates with the Board, Staff, the gatekeeper, and the spouse or significant other with the Chair's permission.
- Set regular activities that will engage, educate, and inform the Chair. These activities should involve senior staff and if appropriate clients of the nonprofit. It is important for the Chair to understand the roles, talent, and breadth of experience of the key staff.

It is time to review some pointers for the Board Chair: The Board Chair is an integral part of this relationship. The Board chair's first responsibility is to ensure that the Board of Trustees (Directors) is a cohesive positive force for the mission and goals of the nonprofit. The Chair, as the elected leader, should encourage and persuade the board to carry out its core functions of being Ambassadors, Stewards, Policy-Makers and Builders for the organization. These principle functions should be continually in the forefront of the

Trustees work together and in their work with the staff.

- The Board Chair is responsible for monitoring and evaluating the performance of the CEO. He, or she, should conduct a formal session at the beginning of the term of service and establish an agreed upon set of objectives and milestones for the CEO for the year. This session should produce realistic goals for the CEO based on the mission, operating structure, and resources available to move the organization in a positive direction. These objectives and milestones should be reviewed with the Board at the first meeting of the new operating year. This is an important activity to establish a common framework for success. It is vital that the evaluation process be ongoing and conclude formally at the end of the year.
- The Board Chair should function as the gatekeeper between the Board and the CEO and Staff. Many Board members do not understand their role in relation to the CEO and staff. I have been quoted a number of times complaining about Board members who assume the role of **trying to direct** the CEO or a staff member. As a volunteer, a Board member may assume an important role in carrying out a special event or executing a program, but that person is a partner with the staff in achieving the success, not in running the day-to-day operation.
- The Chair has the responsibility to develop the members of the Board of Trustees as he, or she, would develop their own staff in their business organization. The successful perpetuation of a nonprofit is the responsibility of the Board leadership. The Chair with the assistance of the CEO should monitor and evaluate the contributions of Time, Talent, and Treasure each member makes to board and the board members' potential for assuming a leadership role.
- The Chair should have regular communication regime with the Board. This plan will involve the CEO in providing pertinent for the Chair and assisting with the development of the communication and the delivery of the information to the Board. This technique will help to solidify the Chair's role as the **board leader**.
- The Chair and CEO should have regularly scheduled face-to-face sessions to maintain a good communication pattern. Human interaction is important. Emails and phone calls are no substitute for open and honest exchange of ideas one-on-one.
- The Chair should make an effort to become well acquainted with the CEO. Knowing about a person's background, their life outside the organization and other interest will enable the Chair to better relate to and understand the attitudes and motivations of the CEO.

Based on forty plus years of working in and with nonprofits, there is not one factor for organizational success that is more important than a strong, warm, professional relationship between the Board Chair and the CEO. It sets the tone for everything that happens with the organization.