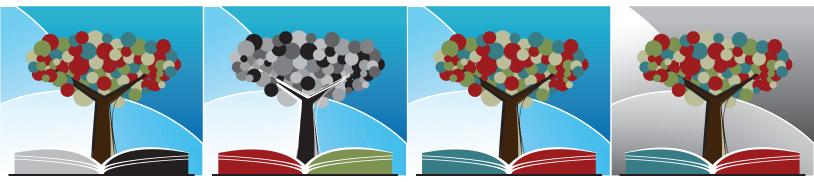# Voluntary Boards and Executive Directors
A Relationship for Organizational Stability

Larissa Silver
Volunteer Ottawa

Paula Speevak Sladowski
Centre for Voluntary Sector Research and Development

With the assistance of:
Robbie Giles
Carmen Drouin
Christopher Jennings

Knowledge Development
Canada Volunteerism Initiative
Développement des connaissances
Initiative canadienne sur le bénévolat

Imagine Canada

Canada

Table of Contents

Acknowledgements

Jihan Abbas - Canadian Association of Independent Living Centres

Rita Assabgui - Royal College of Physicans and Surgeons

Paula Agulnik - REACH

Brian Tardif - Citizen Advocacy of Ottawa

Bill Belanger - BB Consultants

Lorraine Bentley - Options Bytown

Sylvia Ceacero - Beechwood Cemetery Foundation

Brian Chapman - HRSDC

Mela Constantinidi - The Ottawa Art Gallery

Lawrence Cumming - Oxfam Canada

Eileen Dooley - United Way/Centraide Ottawa

Carmen Drouin and Associates

Havi Echenberg - Consultant

Margaret Fallis - Centretown Laundry Co-op

Jill McFarlane - Housing Help

Danielle Fréchette- Royal College of Physicians and Surgeons of Canada

Sibyl Frei - Debros Marsh Consulting

Miriam Fry - CBC

Brenda Gallagher - Ottawa Chamber of Voluntary Organizations

David Gibson - Sandy Hill Community Health Centre

Robbie Giles - Consultant

Debbie Gilmer - Strong Boards - Volunteer Ottawa

Richard Goddard - Good Companions

Jenny Gullen - Social Planning Council of Ottawa

Kathryn Hill - Interval House

Caris Hughes - Society of Canada - Ottawa Chapter

Cathy Jordan - Western Ottawa Community Resource Centre

Charles Laframboise - Distress Centre Ottawa and Region

Gail Logan - Ottawa Chamber of Commerce

Jane MacDonald - VON Canada

Karen MacInnis - Interval House

Lauree Mackennie - MS Society of Canada - Ottawa Chapter

Ruth Mackenzie - Volunteer Canada

Anne Makhoul - Caledon Institute

Brendan Mansden - Canadian Cancer Society

Louise Martin - Good Companions,

Barbara McInnes - Community Foundation of Ottawa

Ralph Meehan - CNIB

Maureen Molot - Carleton University

Diane Morrison - The Ottawa Mission

Hugh Nelson - Ys Owl Maclure Co-op Centre

Bob Osterhout - Ottawa Humane Society

Gary H.J. Pluim - WaterCan/Eau Vive

John Rapp - Dovercourt Recreation Association

Bruce Rooney - Ottawa Humane Society

Vivian Runnels - University of Ottawa

Tim Simboli - Family Services/à la famille Ottawa

Margaret Singleton - Ottawa Salus

Jeff Stellick - Ottawa School of Art

David Spring - Jewish Community Centre

Tracy Sutton - Housing Help

Pauline Tardif - ORBIS Canada

Bill Tholl - Canadian Medical Association

Barbara Tiffin - Volunteer Services, City of Ottawa

Bethany Tory - Elizabeth Fry Society of Ottawa

Liz Tyrwhitt - Ottawa Branch - Canadian Red Cross

Colleen Whiteduck - Elizabeth Fry Society of Ottawa

Vera Yuzyk - Beechwood Cemetery Foundation

Debi Zaret - Elizabeth Fry Society of Ottawa

Voluntary Boards and Executive Directors: A Relationship for Organizational Stability

Introduction

Leadership in staffed nonprofit organizations in Canada is a shared responsibility between paid staff management, usually headed by an executive director, and a volunteer board of directors headed by a board chair or president. This relationship, and the support or tension it creates, affects the overall stability of a nonprofit organization, particularly its ability to remain focused on its mission in the face of inevitable challenges and to take advantage of emerging strategic opportunities.

Executive directors, usually the senior paid staff members in nonprofit organizations, are responsible for providing leadership and direction to other staff and to volunteers. The executive director can be seen as the "pinch point" for decisions and responsibility and acts as the hub between service staff, volunteers, the organization's board of directors, its funders, its client population, and the community at large (Seel & Angelini, 2004). A recently released study of nonprofit executive directors in the United States found that the executive director's relationship with the board strongly affects the rate of turnover among executive directors (Bell, Moyers, & Wolfred, 2006). The study also found that most executive directors do not see their relationship with their board as an effective strategic partnership.

We designed a community-based research project to gather insight into the relationship between local executive directors and their board chairs, what they believed defined the successes in their relationship and why, and what methods, processes, or conceptual approaches they felt were most important in creating a positive working environment. Specifically, we sought information about the responsibilities of executive directors and board chairs, how the relationship between the two fluctuates, and how the dynamics of this relationship affect organizational stability.

This report is not intended to act as a final pronouncement; rather, it presents common themes and challenges as well as the practices and characteristics of a strong executive director/chair relationship as reported through the voices of project participants.

Methodology

Our research consisted of a four-stage, cumulative process designed to place challenges and solutions in a local context and to gather focused feedback from executive directors and board members from a range of nonprofit organizations in the Ottawa area. The four stages are described below.

1. **Building the Context: Roundtable Discussions.** Two roundtable discussions were held in the spring of 2006. The purpose of the roundtables was to bring together leaders, funders, and individuals with broad experience in a number of nonprofits to discuss the trends, issues, challenges, and best practices they had observed in Ottawa's nonprofit sector as they relate to executive directors, boards of directors, and the relationship between the two. A total of 17 people attended these roundtables. Participants included sector consultants, community and government funders, academics, board presidents, executive search firm representatives, and executive directors. We sent a generic invitation to every local funder, local consultants known for their breadth of experience in dealing with governance and senior staff interactions, local academics whose research addresses nonprofit governance, executive search firms that deal with large nonprofit institutions, and large-scale nonprofit organizations.

   Roundtable participants were asked to share their perception of the current trends that affect the relationship between executive directors and their boards and to connect these trends to their potential impact on organizational stability. The trends identified in the roundtable discussions could be grouped into four general themes. We used these themes to help guide the questions we asked in the interviews and focus groups that made up the next two stages of our research. These themes were:

   - governance vs. operational leadership: definitions of roles and relationships;
   - recruitment and retention of board volunteers;
   - dominance of fundraising concerns; and
   - evaluation of board and executive director effectiveness.

2. **Drilling the Issues: Interviews with Executive Directors and Board Chairs.** An independent consultant conducted 13 interviews with board chairs and executive directors in the Ottawa area. Interviewees were drawn from nonprofit organizations that varied in size and worked in the areas of health, social justice, homelessness and poverty, animal services, disability, and counseling. To choose interview candidates, we made a list of organizations that varied in size, mission and mandate, cachement area, and language of service delivery. Information about the project was sent to executive directors and, where possible, board chairs. We then made follow-up phone calls to encourage interview participation. Eight interviews were conducted with executive directors and board chairs from the same organizations.[1] Five additional interviews were conducted with executive directors and board chairs from different organizations. Executive directors' experience in their current role varied from one-and-a-half years to more than twenty years, with the majority in the

---

[1] Six of these interviews were conducted individually. Two were conducted jointly to accommodate the schedules of the interviewees.

six- to ten-year range. Board presidents had wide-ranging volunteer board experience and had been in their current positions for between one and four years. Interviewees were asked to identify characteristics of an effective board/executive director relationship as well as any resources that they had found particularly useful.

Interviews focused on four main areas:

- the impact of key trends and challenges in the sector on volunteer leadership and board governance;
- the roles of and dynamics between paid senior staff and the board of directors;
- the impact of this relationship on the organization; and
- tools, resources, and policies that could support and strengthen the relationship between the executive director and the board.

A vital part of the interview process was to evaluate the connections between the key themes, the interdependent roles and responsibilities of volunteer boards and senior management, and the impact of that relationship on organizational stability. Based on the data from the interviews, the interviewer identified five separate areas of concern and, for each area, a number of specific concerns or gaps in the resources. These areas of concern, including the gaps, were then presented to two focus groups in the third stage of our research.

3. **Feedback: Solutions and Resources – Focus Groups.** Two focus groups were facilitated by an independent consultant and were composed of a total of 31 board members, board chairs,

and current and former executive directors from organizations that varied in terms of size (from large national organizations to small community co-ops) and mission (e.g., health, arts, poverty and homelessness, disability, children, animals).

Focus group participants were directed through a series of questions that probed five broad topics:

- recruitment and retention;
- agendas and conduct of board business;
- evaluation;
- the impact of funding and fundraising; and
- engagement of board volunteers.

Participants were asked to talk about the challenges and the best practices they had experienced in each of these areas. The facilitator guided discussion through each area and invited participants to leave behind notes on practices or comments that they did not have an opportunity to express in the group as a whole.

4. **Analysis and Review.** This report forms the final stage of the project and applies the context-based responses of community members to the initial questions and assumptions that motivated this study. The findings presented here reflect the recurring themes and situations that were raised by respondents at various stages of inquiry. The resources listed at the end of the report are resources that project participants said they had used themselves and found helpful.

Findings

Roundtable participants, interviewees, and focus group participants all agreed that the relationship between the executive director and the board, particularly the board chair, is the key relationship in any staffed nonprofit organization. How these two individuals communicate, support each other, and work together determines the effectiveness of the organization as a whole and filters down through all its operational aspects.

Both the executive directors and the board chairs who participated in the project clearly valued each other's role in the organization and consistently expressed the desire to have a good working relationship for the benefit of their organization and, ultimately, the organization's client group or population.

How resilient an organization can be in responding to the trends and fluctuations of a dynamic nonprofit sector has a great deal to do with the effectiveness of the relationship between the executive director and the chair. The relationship can be supported by adopting systems and processes to guide the board's work, ensuring ongoing communication between the executive director and the chair about roles and responsibilities, and regularly evaluating the work of the board and the executive director.

Ongoing communication and constant evaluation are necessary because the nonprofit sector is fluid. Community needs change, requiring organizations that serve communities to keep pace. Funding bodies are affected by politics, donor demographics, and social issues, which in turn affect the finances of nonprofit organizations. Over time, each organization develops its own culture, which leads

to unique challenges and solutions, and the variety of organizational cultures suggests that no generic solution will work for all organizations.

Participants in our research project spoke about the need to stabilize individual relationships between senior leaders so that organizations can respond effectively to a fluid and dynamic environment. Participants underscored the need for clarity in the organizationally defined roles of the executive director, the board, and the board chair and noted that these roles must suit the culture, mission, and direction of the organization. Board members and executive directors both stated that it is critical that organizations have systems for making decisions and developing policies that clearly define responsibility and authority. The need for these systems, policies, and practices became increasingly important as roundtable, interview, and focus group discussions moved into the challenging areas many nonprofits experience in their work and that can put pressure on the working relationship of the executive director and the chair. These areas are discussed below.

Recruitment and retention

While the importance of the relationship between the executive director and the board remains constant, every time there is a new executive director, a new board member, or a new board chair, the dynamics of the relationship change. One interviewee described a core characteristic of board/executive director relations in this way: *"Executive directors come and go; the board is forever."* Conversely, another interviewee noted: *"The board changes, the executive director doesn't."* While individual board members are usually appointed for fixed terms, some of the executive directors who participated in our research had been in their positions for over 20 years. This

suggests that executive directors have to manage relationship change more often than board chairs and board members do. Maintaining stability in the relationship between boards and executive directors, then, is a process of managing permanent transience. Participants in our research stressed the importance of succession planning to control this permanent transience and to ensure the continuity of working relationships at the leadership level.

Participants repeatedly emphasized the value of fixed terms for board members and of planning for transition. Knowing who will be leaving when allows boards to anticipate the need for knowledge transfer between outgoing members and new recruits. In addition, predictable vacancies allow more opportunity to employ a phase-in/phase-out transition, which helps to preserve valuable "history" on the board. Because executive directors do not have fixed terms, their turnover is less predictable. Most of the executive directors who participated in our study had been in their positions for a number of years and, although none planned to leave in the near future, most supported the need for a succession plan for management as well as for the board and the board chair.

Effective succession planning ultimately depends on getting the "right" people to replace departing board members. One thread of discussion focused on turning competition between nonprofit organizations for these "right people" into cooperation. Succession planning could be improved by consulting with other volunteer boards that may have valuable people nearing the end of their term and who might be interested in serving on another board. More broadly, participants suggested developing a skills matrix based on the organization's strategic priorities and

focusing recruitment on acquiring people with those skills. Similarly, a "skills wish list" could allow the board to balance its existing skill set with the skills the organization will require in the near future. Developing a "wish list" of skills based on potential growth areas for the organization might also encourage current board members to expand their own skill sets in order to fill an existing or future gap. Executive directors might want to support this approach as part of an investment in the board's volunteer experience.

Preparing for board turnover involves an ongoing commitment to recruitment. Participants in all stages of our research suggested that all boards should have an ongoing, active nominations committee that is responsible for interviewing prospective volunteers and assessing not only their skills but also their passion for the work. They also suggested assessing candidates within and against the existing board's group dynamics and organizational culture, not for uniformity of thought but rather for candidates' ability to fit into the group. One way to assess fit is to invite candidates to attend a board meeting before finalizing their interest in serving on the board.

A skills matrix or wish list, in combination with fixed terms for board members and a year-round commitment from a nominations committee, can guide the recruitment of new board members based on strategic needs (instead of "who do we know?") and help manage those instances when board members withdraw before the end of their term. The strategic vision behind the skills matrix helps the nominations committee to assume responsibility for developing the breadth of the board's perspectives on the community that the organization serves and works in.

One respondent suggested that recruiting based on skills that will have an impact on the future of the organization may require the board to be open to change. To attract new members with the targeted skills, boards may need to alter the way they conduct their business (e.g., changing meeting styles and/or frequency, adopting new technologies in place of traditional meetings, or increasing or decreasing the role of committees). Incorporating the fresh perspectives of new members may promote similar changes which may, in turn, encourage more active discussion and engagement and less passive approval of reports.

Participants at each stage of our study identified the need for organizations to recruit board members from diverse populations, age groups, sectors, and perspectives. They cautioned that successfully recruiting from various population segments can be a challenge given how boards traditionally do business and what people are looking for from their volunteer roles. For example, many participants noted that young retirees may be an excellent potential source of board volunteers but that the typical length of a board term – often measured in years – and the need to be available throughout the winter months when candidates may prefer to travel can act as barriers to board volunteering. According to Linda Graff and Mary Merrill (2005), young people are often looking for short-term or project-based volunteer experiences that have an immediate, measurable impact on a cause or issue. Board roles rarely provide these types of experiences, which may make recruitment of young people more challenging. Paying attention to demographic trends can help develop an awareness of what potential volunteers from a variety of demographic groups expect from their volunteer experience.

Some participants suggested recruiting prospective board members to serve on board committees as a way to give them an opportunity to get to know the organization and its work. Committee work can be short-term or project-based with immediate results and is often linked to at least one board member, if not to the board as a whole. Board candidates who have participated in committees have already demonstrated their support for the organization and may have worked with the organization's client group or service population while on a committee. This may help them see that serving on the board can have a direct impact in the community.

Agendas and the conduct of board meetings

The chair and the executive director should jointly develop the business of the board so that it supports the organization's strategic direction. Meeting agendas, for example, can reflect the board's ability to manage itself and its work. An agenda should be structured around the strategic plan. As one participant said: *"Always ask, 'is this part of our strategic plan, and if not, why are we dealing with it?'"*

Who manages whom in a nonprofit organization? Some executive directors feel that the board chair is their boss and expect the chair to understand this. In other cases, executive directors felt that they managed the board members individually but that the board as a collective is their boss. For many participants, the balance of supervision meant that the executive director should never second-guess the board: the board makes the decisions and the executive director guides them in making those decisions. The executive director, however, manages the operations of the organization and the board should not second-guess the executive director's leadership. Being comfortable

with an executive director making decisions – and many participants supported the idea that a good executive director makes bold decisions – often turned on the need for transparency in management. The more a board understands how the executive director is making decisions, the easier it is for a board to trust in those decisions. Transparency can be achieved through the model described above: a work plan developed from an operational plan that is developed from the strategic plan. Successful executive directors find a balance between assisting the board in its leadership role and being led by the board.

Managing "difficult" board members recurred as an example of how management responsibilities can blur in practice and how organizational culture affects procedures. Several reasons were given for board chairs not managing disruptive board members: they do not see the impact that dysfunctional board members have on staff, they are uncomfortable managing a 'peer,' or they feel that managing board members is the purview of the executive director. Some executive directors felt that they had to coach the chair on how to handle the situation or had to try to manage the board member themselves even if they felt this was the chair's responsibility. In some cases, however, executive directors believed that it *was* their responsibility to manage errant board members just as they manage errant staff, which may or may not be the perspective of their board chair.

Most participants agreed that it is the responsibility of the board chair to set the agenda and manage board meetings effectively. Participants stated repeatedly that an agenda that continually focuses on the mission, the future of the organizational, and monitoring of responsibilities is key to maintaining the board's focus and ensuring that its work has a

positive impact on the organization. Board chairs must be prepared to manage their board colleagues, to keep them focused and on-track during meetings. One participant suggested that being clear about what is being asked of the board for each agenda item helps maintain focus (i.e., is the item being presented for information, for discussion, or for a decision?). Similarly, it was suggested that the agenda be structured around strategic items so that any operations business will be conducted in the context of strategic planning.

Many chairs and executive directors who participated in our research reported that, when developing their board agendas, they try to strike a balance between having enough structure to keep meetings focused while allowing for flexibility to encourage creative and strategic discussion. New issues, pressures, and opportunities can develop quickly in the nonprofit sector, and board agendas need to be able accommodate these changes. Some chairs and executive directors reported that they leave time at the beginning of board meetings to discuss strategic priorities and/or items that could affect the organization (e.g., a magazine article, a business expanding in the city, or the potential impact of municipal or provincial policy changes). All board members are encouraged to bring these items forward and to participate in the discussion. It was felt that this supported board members' engagement with the organization, its future, and strategic directions.

The executive director's participation at board meetings, particularly the executive director's report, is one of the key avenues of communication between the board and staff. Participants suggested that the executive director's report should clearly connect the operational plan to strategic goals and distinguish

between short-, medium-, and long-term goals. Some executive directors distinguished between reporting that seeks conceptual support from the board and reporting that emphasizes the need for approval because the latter can drift into second-guessing or criticism of operational decisions.

Finally, participants suggested leveraging technology as a way to reduce barriers to board participation and to attract and keep board volunteers from various demographic groups. Allowing board members to attend board meetings via conference call accommodates lifestyle differences and travel challenges. Similarly, the Internet provides a number of group meeting sites where scattered participants can stay in touch, board documents can be posted for review, and ongoing discussions can be held. This can help keep both interest and commitment high.

Evaluation

How the executive director reports to the board can guide the board chair's approach to the evaluation of the executive director. Several participants suggested that they or their boards struggle to assess the executive director because they feel that the board lacks both sufficient context and nonprofit sector experience to make an informed evaluation. Many participants suggested that the evaluation of the executive director should be based on an agreed-upon work plan submitted by the executive director at the beginning of each fiscal year. This work plan (which is based on the organization's operational plan which, in turn, is based on the strategic plan) can provide evaluation criteria that allow the board to measure performance against goals rather than reacting to or judging the most recent events or decisions.

The operational plan should to be revisited frequently to ensure that it reflects the organization's needs and is responsive to emerging challenges and opportunities. There will be few surprises during evaluations, for either the board or the executive director, if the executive director's reports are centred on the agreed-upon responsibilities laid out in the operational plan. One organization that participated in our research reported that it bases its executive director's evaluation on a "performance contract" and that the board and the chair collaborate with the executive director to refine the executive director's responsibilities and how they will be measured and evaluated.

Participants noted that there is a connection between who performs the evaluation of the executive director and the value of the information gathered. Asking the entire board to perform the evaluation can be unwieldy and uneven, but leaving the evaluation to the chair alone puts additional pressure on the chair/executive director relationship and limits the perspective and range of the evaluation. One solution is to assign members of the board's human resources committee (if it has one) or executive committee the task of performing the evaluation and presenting a summary of the findings to the board. The advantage here is that the committee can take more ownership of the evaluation while still ensuring that the results have value for the executive director by working with the executive director and the board on format and criteria.

To supplement an annual review of the executive director, several participants suggested a biannual or triannual 360-degree evaluation of the executive director's performance as a way to, in the words of one participant, *"make a good executive director*

better" by reflecting the effect of her/his leadership on all aspects of the organization and on community stakeholders. Most participants agreed that executive director evaluations can be effective tools for improving performance and not just judging the performer, provided that the evaluation is based on clear, agreed-upon expectations. Various executive director evaluation tools and 360-degree models are available; those that were mentioned by the participants in our research are included in the Resources section at the end of this report.

How a board is evaluated for its effectiveness is an open question for many of the organizations that participated in our research. Boards were typically understood to be responsible for evaluating their own performance as well as the performance of the executive director. Participants named several resources that provided models or templates for group and individual board evaluations (e.g., Strong Boards, Board Walk, Board Source; see the Resources section at the end of this report). They appeared to be less concerned about which evaluation template was used than they were about the application of the information gathered in the evaluation process: what happens to the completed evaluations and what actions can be taken based on the information they contain?

Board evaluations were also identified as an important foundation for peer sanctioning and attempts to correct dysfunctional relationships within the board. The process for dismissing board members who are having a detrimental impact on the organization is not always clear and needs the support of a written process. Because by-laws typically cover only extreme cases, they offer little guidance on dealing with disruptive behaviour that might require only

"reining in" or mediation. Evaluations offer concrete support to chairs or executive directors so that they can address emerging problems with board members before they become serious. A work plan for the board, like "performance contracts" for executive directors, may also help frame the evaluation of the board by articulating performance benchmarks.

Board evaluations, used as a tool to evaluate board processes and procedures, can help frame the executive director/chair relationship through the transition between board chairs by establishing procedural continuity within the context of changing personalities. Because board chairs have fixed terms, executive directors may need to adapt to new work styles, priorities, and commitments every two to three years. Continuity in the way the board works with the executive director, particularly if the board evaluation includes sections on what works best with senior staff, can help frame discussions of such changes and contextualize their impact on the organization.

An ongoing process of examining its own effectiveness can help a board establish how it actually works: is it a policy governance board, a working board, a collective board, a governance board, or some blend of these? The size and mandate of organization has an impact on the type of board the organization requires; for example, smaller organizations often need boards that can blend governance with direct support for operations. The variety of organizational needs in the nonprofit sector has led to the development of non-prescriptive models of board governance that can be adapted as required. It is important for a board to consider how its method of governance will affect staff and to adopt models of working that do not put a strain on staff resources. Many research participants stressed that boards

should concentrate on what works for the organization rather than attempt to adhere strictly to one particular model of governance. For example, while a board may extricate itself from operations, it might ask the executive director to clarify the rationale behind certain recommendations or operational requirements.

Impact of funding and fundraising

Funding and the need for more money is an issue for many nonprofits and, regardless of the governance model the board adopts, organizations seem to be struggling with who is responsible for raising money: the executive director or the board of directors? Participants expressed frustration over the need to recruit board members for their fundraising experience and skills and with the difficulty of recruiting new volunteers with nonprofit sector experience when the work of the board focuses almost exclusively on generating money. Concern was also expressed that fundraising expertise or connections may play too large a role in the hiring of new executive directors.

Some executive directors and board members who participated in our project felt that they were trapped in a fundraising loop. They knew they needed money to deliver services, but in many cases weren't sure of the best way to find that money. The pressure to find money can be all-consuming; it can create *"a fear-based culture"* that is *"driven by the pursuit of dollars"* and can take over most of the board agenda and the executive director's time, often to the detriment of services, strategic planning, and the mission of the organization.

Participants noted that clear communication around fundraising is a way to forestall potential conflicts about who has the lead responsibility for fundraising and what the expectations are. Both the board and the executive director need to understand the time, effort, and costs involved in fundraising in order to make informed decisions about funding solutions. Participants also focused on the importance of clarifying the relationship of fundraising to strategic, mission-focused activities.

None of the participants in our research had a "magic bullet" solution to the funding situation in the nonprofit sector. Methods for meeting these challenges varied from organization to organization and participants offered many creative perspectives and approaches. Specific methods ranged from "living within means" by matching services to current or available funding to setting up a foundation with a board reporting to the organization's board whose sole purpose is to generate funds.

Engagement of board volunteers

There seemed to be consensus that, when it comes to fundraising, board members are expected to act as ambassadors for the organization in the community. Part of a board member's responsibility is to stay current on the issues, challenges, and successes of the organization and be prepared to speak on behalf of the organization whenever an opportunity presents itself. An organization is strengthened when funders and the community, including other organizations in the sector, recognize the contributions of its board members. This responsibility requires the board to develop a message that explains the organization's impact on the community. This message should be tied directly to the executive director's operational plan which is, in turn, framed by the board's strategic plan. The goal is continuity in the message communicated to the community.

To meet these expectations, board members must understand the organization, its work, and the clients or community it serves. Board members cannot achieve this understanding through the executive director's reports alone. They should be encouraged and invited to attend the organization's events, meet with staff, and engage with clients or the serviced population at community events or at the organization's gatherings. Both the executive director and the board chair must work together to foster this level of board engagement.

Conclusion

The suggestions about processes and responsibilities discussed above can only be as successful as the executive director and board chair's relationship. Ongoing communication through regular meetings, understanding and accepting responsibilities, and creating a culture of mutual respect is integral to an effective relationship. The nature of this relationship will be felt throughout the organization.

This project is a first step in what ideally could be an ongoing study of how nonprofit boards and staff work together to serve their clients or specific populations. The project brought together executive directors and board chairs to think and talk about their relationship and brought to the surface practices and procedures that can make the relationship easier. Further research could help us understand more fully how, for example, the length of the executive director's employment affects a board chair's experience of the organization. There are many characteristics of nonprofit organizations (e.g., size, budget stability, service area, community profile) that may alter the board/executive director relationship.

The executive directors and board members who participated in this project all brought creative and interesting perspectives to the challenges nonprofit organizations are managing. *"It's all about relationships,"* one participant said. That comment neatly ties up what we heard from executive directors and board members in Ottawa.

Resources

ABCetc.

www.abcetc.ca

The Adult-Based Continuing Education Training Corporation's website includes "Governance for Non-Profit Organizations – Online Training and Certification," which features sample lessons on nonprofit governance and online testing for board members at $15 per person. Further training can be ordered through the website. (Fees for programs and evaluations; Canadian.)

"The Alternative Board" (TAB)

www.tabboards.com

TAB "facilitates monthly peer advisory boards comprising local owners, presidents, and CEOs who run non-competing businesses. Each month members gather to share experience and solve challenges to grow to the next level" (TABboards.com). They also offer one-on-one mentoring and coaching. The website offers a meeting locator. (Membership and pay resources; American with Canadian franchises.)

Ascension Health

www.ascensionhealth.org/leadership/public/chair_competencies.asp

Ascension Health's website offers a checklist of "Board Chair Competencies and Benchmark Behaviours" that begins with a focus on "Mission, Vision and Values Integration" and "Strategic Leadership." (Free resources, registration required for use of the "Leadership Continuity Database;" American.)

Board Source

www.boardsource.org

Board Source offers a wide range of information and services designed to improve the performance of nonprofit boards, including their own publications ("Books and Tools") and links to further information ("Knowledge Centre"). Evaluation manuals can be found under "Books and Tools." (Free links, pay resources; American.)

"The Chair/CEO Relationship" (Ray Berndtson)

http://www.rayberndtson.ca/PDF/ChairCEO.pdf

Sub-titled "Ten Commitments for a Better Partnership," this booklet is a quick reference focusing on large organizations. (Free; Canadian.)

Governance

Robinson, Maureen K. *Non-Profit Boards that Work: The End of One-Size-Fits-All Governanc*e. Toronto: John K. Wiley and Sons, 2001.

Illinois Arts Alliance/Foundation

http://www.artsalliance.org

The Foundation offers several useful publications that focus particularly on the nonprofit arts organization including *Succession Planning* and *Succession: Arts Leadership for the 21st Century*. Abstracts and tables of contents can be viewed on the website. (Pay resources; American.)

Imagine Canada

www.imaginecanada.ca

The Imagine Canada website offers a freely accessible PDF "Code for Ethical Fundraising" supported by tools and resources and the opportunity to register as a Code adherent. It also offers a number of resources and benefits tied to paid membership. (Free Code, pay membership; Canadian.)

Imagine Canada – John Hodgson Library

www.imaginecanada.ca; www.volunteerottawa.ca

This library provides free resources that help Canada's nonprofit and voluntary organizations work effectively in their communities of practice. Resources cover topics such as board development, charity law, legal issues, and volunteer management. (Free; Canadian.)

Management Help

www.managementhelp.org/boards/brdjobs.htm

This website contains an excellent, free management library that includes job descriptions for all of the major roles on a volunteer board. It includes links to comparable sites for further information and resources. (Free; American.)

Strong Boards

www.strongboards.ca

This website provides an array of support for nonprofit boards, including checklists for board effectiveness, guidance for board development, links to further information on addressing board issues (e.g., structure, roles, goals, and missions). The Strong Boards project also offers free, customizable consultation sessions and development sessions to identify areas of strength and areas of development for individual boards. (Free; Canadian.)

Voluntary Sector Knowledge Network (VKSN)

http://vskn.ca/vskn.htm

Another strong resource for reference material, the VSKN site breaks down material into seven sections including "leadership," "accountability and evaluation," and "information technology." Each offers a short, general overview that is supported by brief abstracts for a number of links to further reading. (Free; Canadian.)

Volunteer Canada

www.volunteercanada.ca

This website includes a large, searchable online resource centre that contains both Canadian and American information. (Free; Canadian.)

References

Bell, J., Moyers, R., & Wolfred, T. (2006) *Daring to lead 2006: A national study of nonprofit executive leadership.* San Francisco: Compass Point Nonprofit Services and the Meyer Foundation.

Graff, L., & Merrill, M. (2005). *The future of board governance: Are you ready?* Presentation delivered to Volunteer Ottawa, Ottawa, Ontario.

Seel, K., & Angelini, A. (2004). *Strengthening the capacity of executive directors*. Paper presented at The Association for Research on Nonprofit Organizations and Voluntary Action, Los Angeles, California.

This and other Knowledge Development Centre publications are available online as a special collection of the Imagine Canada — John Hodgson Library at www.nonprofitscan.ca.

The Knowledge Development Centre is hosted by Imagine Canada, a national organization that supports Canada's charities, nonprofit organizations and socially conscious businesses and champions the work they do in our communities.