COO Roles and Structures: Stories from the Field

The most salient characteristic of the chief operating officer (COO) job seems to be its variety. COO roles, and the organizational structures in which COOs operate, are highly varied across organizations and even within a single organization over time. Perhaps more than any other role, the COO position is tailored—and in some cases created or eliminated—to fit the needs of an organization at a particular point in its development.

Consider the diversity of COO positions in the nonprofit sector and the fact that, as we will see below, two COOs' sets of responsibilities may actually have no overlap whatsoever. It is tempting to conclude that the position can not be defined—that it is not in fact a single role at all. However, in Bridgestar's research on the position, we have encountered enough common themes, issues, and approaches that we believe it is indeed useful to talk about the COO role as one entity.

For purposes of this discussion, we define the COO at a nonprofit organization as a manager who ...

... is second in command to the executive director (ED), and/or

... reports to the ED and oversees operations and administration, and/or

... has the title COO.

While the variations on how COO responsibilities are structured appear endless, most COO positions can be categorized under one of three basic models:

- **The COO oversees all operational and administrative functions.** In this model, the COO oversees the functions that support the programs but do not relate directly to participants, and other senior managers are responsible for the programs themselves. For example, as COO of Citizen Schools, Emily McCann oversees all the network services that support the program sites, including finance, office management, human resources, technology, curriculum and instruction, performance management, and research and evaluation. Other senior managers who report to the president and

chief executive officer (CEO) oversee the Boston program, the national network, development, and field building initiatives.

- **The COO oversees all programs.** In contrast to the first model, some COOs are responsible primarily for programs, while the ED, the chief financial officer, or another senior executive oversees the more administrative functions. When Lyndia Downie was vice president of Pine Street Inn, all of the programs reported to her, and she was second in command. Human resources, finance, planning, facilities/operations, and development and external affairs reported to the president.

- **The COO oversees all internal functions.** This third model is the broadest: the COO oversees everything internal, freeing up the ED to focus on external matters such as fundraising, public relations, and partnerships. David Williams, executive vice president and COO of Habitat for Humanity from 2000 to 2004, ran the organization internally while Founder and then-President Millard Fuller was the external face of Habitat. All of the other senior managers reported to Williams.

In addition to these variations on how organizations define COO responsibilities, there are differences in how organizations see the COO as a leader in the organization and a member of the management team. For example, is the COO a possible future ED learning the ropes? An implementer whose hands-on approach complements the ED's vision and charisma? The *Harvard Business Review* article "Second in Command: The Misunderstood Role of the Chief Operating Officer"[1] describes seven such roles, from "the partner" to "the heir apparent," and the corresponding circumstances under which a company might hire a COO in this mold.

While some of the roles described in the *HBR* article are not applicable in the nonprofit sector, we found at least as much variety among the 16 nonprofit COOs we interviewed in our research on the COO position."[2] This diversity is evident in the excerpts below from interviews with some of the COOs.

Ben Fenton, COO and Co-Founder, New Leaders for New Schools

From the time when we first founded the organization, Jon Schnur was the CEO, and he handled overall management, strategy, fundraising, and external partnerships. The chief program officer was Monique Burns, and she had responsibility for selecting, training, and coaching the new leaders. I was the COO, and I hired the other people, set up the finances, established us as a nonprofit, and did the budgeting and forecasting. It seemed obvious to all of us to split it up that way because of our respective skill sets. I didn't have particular

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1 Nathan Bennett and Stephen A. Miles, "Second in Command: The Misunderstood Role of the Chief Operating Officer," *Harvard Business Review,* May 2006.

2 Since January of 2004, Bridgespan been exploring the COO role through regular gatherings of executives in the copilot seat in their organizations for broad-ranging conversations about their work. In addition, we conducted a brief electronic survey of 23 COOs and a series of 16 in-depth interviews about the COO position with nonprofit COOs and EDs representing a diversity of organizational growth stages, budget sizes, funding sources, geography, missions, and individual backgrounds and tenures.

expertise in education, but I knew how to do all the operational stuff, so I created the structure, wrote the business plan, etc.

Over time, my job evolved into something very different. I maintained responsibility for the operational details but as those were staffed with more positions, the larger part of my job became managing the program sites. At the end of the first full year, we had two partnerships with school districts and executive directors for each. I manage those EDs, and that's now 70 percent of my job. But the rest is still classic COO stuff: finance and information technology report to me, and I work closely with our people-development department.

Our structure is evolving very rapidly. As CEO, Jon has a number of chief officer direct reports. In addition to me, he has a chief program officer, a chief people-development officer, and a chief knowledge officer. We are creating a chief officer of external relations position. Jon also oversees the director of development, the person who develops new city relationships and other external partnerships, and the chief of staff. Marketing, recruitment, and admissions report to me as COO. We are still making a lot of changes; we haven't yet found a structure we feel fully comfortable with. We have looked at having three chief officers reporting to Jon, but each would have a huge portfolio.

I am much more internally focused than Jon, so 95 percent of my meetings are with staff about their goals, strategies, progress, etc. Jon has maybe 60 percent external meetings. Jon's involvement in things like budgeting or recruitment and admissions is focused on the highest-level strategy. Jon and I work closely together on planning each week's national management team calls; we talk about what are the biggest strategic decisions, what needs to be on the agenda.

Jerry Hauser, former COO, Teach For America (current President and CEO, the Advocacy Institute)

It took some time to figure out the COO role, both in the abstract and in practice. I was managing the day-to-day operations of the organization. Everyone in the organization reported in through me and I reported to Wendy [Kopp, President and Founder]. We very consciously did not define our roles as internal versus external. It was good for me to do some external work, and Wendy didn't want to be removed from the internal side; a good ED can't just be the external face. Creating the COO position freed her up to do more external work but also to be more strategic about how she involved herself internally. I ran the teams and made sure everything was happening the way it should, so she had flexibility about what she managed internally, and when. For example, if we were struggling with recruitment, she would delve into that deeply and go talk to people and figure out the recruitment strategy, and she could do that without being pulled in too many directions. Eventually we started to articulate the roles as the ED is the vision and strategic direction, values, and goals (though the COO had lots of input on those things), and the COO's job is to make sure we meet the goals.

In terms of role definition, the places where Wendy and I most frequently ran into each other were those that traditionally fit into the ED purview: marketing and development. She was out doing a lot of the fundraising herself. Many times it made sense for her to work directly with head of development, but then there were questions about when the development person goes to her versus to me. Essentially, the development director had two bosses. It basically worked; I managed those areas with a lighter touch knowing that Wendy was more engaged with them. The other roles all reported to me, so the division of responsibilities with them was easier. We didn't have any significant confusion about what was whose responsibility. And it helped to have all of the functions report to one person, so we didn't have an imbalance where some things reported directly to her and others didn't; a structure like that only reinforces an ED's inclination to focus on particular areas.

Christina Severin, former Vice President and COO (and current Executive Director), Network Health

I was Network Health's first COO. The reasons for creating the COO position at Network Health were a combination of business growth and the fact that my skill set complemented that of Allan Kornberg, who was then the ED. Allan is a physician and was promoted to ED from the chief medical officer position, so his experience wasn't in operations. The fact that I was a possible successor wasn't explicit or official, but it was definitely a conversation we had on an ongoing basis. We talked often about what skill development I needed so I would be poised to take the position when Allan decided to leave.

As vice president and COO, I was responsible for running the business day-to-day to allow Allan not to worry about the details and to focus externally and strategically. I was second in command; whenever Allan was away, I was in charge. It took a while for people to get comfortable with that setup, but over time they did. Of the senior leadership team, the heads of operations, clinical affairs, and information technology reported to me. The rest, including finance, marketing, HR, and the chief medical officer, reported to Allan. Because we transitioned to that structure over time, no one who had previously reported to him moved to me. We restructured positions and moved the reports as positions naturally turned over.

Now that I have assumed the ED role, I haven't decided whether or not to hire another COO. It's a tricky thing. Right now the senior leadership team has balanced levels of responsibility and a balanced relationship with me. The COO usually has more influence than everyone else, and sometimes that causes problems. Organizationally, it could be easier to develop someone into that position rather than hire someone into it. I came into the position that way myself—it was an evolution.

David Williams, former Executive Vice President and COO, Habitat for Humanity (current President and CEO, the Make-A-Wish Foundation)

I was at Habitat for over 10 years. Originally the COO position was divided into two senior-vice-president (SVP) positions: the SVP of administration and the SVP of programs. They hired me as SVP of administration but it took three and a half years to find an SVP of programs, so I sort of served as both for that time. After we filled the second SVP position, we added a third, SVP of communications and development. The arrangement was that I was the first among equals. It worked, but it was difficult. Millard [Fuller, founder and then-CEO], traveled 85-90 percent of the time. His focus was speaking publicly, raising money, writing books, doing interviews, seeing the programs, and inspiring people. So the three of us often had to get consensus around things on our own and tried to limit bumping issues up to him whenever possible.

When Millard wanted to add a fourth SVP, separating the SVP of communications and development into two positions, the board said, "You have to have a COO." Initially he resisted, but when the idea came up of promoting me into the position, he was more comfortable with it. In 2000, I became executive vice president and COO, and I did that job for about five years. I was internal, running the organization. I reported to Millard, and basically the rest of the organization reported to me. Eventually I had five SVPs reporting to me: development, communications, field operations, program, and administration. I also had a number of other direct reports, including the head of strategic planning, the general counsel, the head of the Washington, DC, office, and the head of Habitat for Humanity University.

Editor's note: this article draws on "The Nonprofit Chief Operating Officer," which discusses the COO role in more detail and is also available on this site.