

Starting Off on the Right Foot: How to Establish a Good ED-Board Relationship

The relationship between a new nonprofit executive director (ED) or chief executive officer (CEO) and his or her board can often be challenging. Every interaction and decision seems to carry extra weight, as the directors scrutinize the new leader's decisions and actions, and the new leader tries to find the right wavelength on which to communicate most effectively with the board. Even a small misstep—a poorly phrased or timed communication, for example—can have great implications because it is setting the tone for what's to come.

Both parties know that it is critically important to get the ED/CEO-board relationship started off on the right foot, so it can grow into a strong, successful partnership that helps fulfill an organization's goals and weathers any challenges ahead. But there is no blueprint for success. What can be useful, however, is considering the experience of senior leaders who have successfully managed this critical transition.

To that end, we spoke with three CEOs and two board chairs about the preliminary steps they took to ensure that their organization's CEO-board relationships worked from the day the new CEO stepped into his or her role. Their varied approaches cannot serve as precise guides for others to follow. Rather, their insights are meant to help others craft their own plans to lay the groundwork for a strong ED/CEO-board relationship.

Start before the job begins

Scholarship America, a Minneapolis, MN-based national education service organization that mobilizes support for students getting into and graduating from college, is a complex organization, comprising both the all-volunteer Dollars for Scholars program and a business unit, Scholarship Management Services, which administers student loans. Because of the complexity of the organization, Scholarship America Board Chair Mim Schreck made it her priority to really get to know the two CEO finalists during the hiring process and to make sure they understood the organization's strengths, weaknesses, and hopes for the future. "A nonprofit is mission-driven and if the CEO is going off in a direction that the board is not in agreement with, they're never going to be in sync, and it's going to be a contentious relationship," Schreck said. "They have to see eye-to-eye and support each other in the goal of supporting the mission."

Schreck, who was then Scholarship America's acting CEO, met individually with the two finalists to talk about her aspirations for the organization, as did Scholarship America's acting board chair, Richard J.

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Schwab. The two CEO finalists also talked with a number of other board members at a dinner before the final interview. All board members were invited to attend—and participate in—the candidates' final interviews. "We tried to expose them to as many of us as possible," Schreck said.

That approach was valuable. Lauren Segal, who was hired as Scholarship America's CEO and president in March 2010, said that listening to and learning from the board before she was even offered the job allowed her to be far more effective right when she walked in the door as CEO.

During the hiring process Segal learned that the board was united in its desire to take the organization in a new direction. She also learned the priority needs of the organization. As a result, in her first few months on the job she was able to work with the board to, among other things: launch a technology initiative; refocus the fundraising and marketing direction for the organization; move from an activity orientation of "getting in" to college to one that will focus on impact, i.e., "getting through" one's education beyond high school; and kicking off a new strategic planning process with full understanding and buy-in as to what the desired end state will be.

"I always asked people's opinions and perspectives on things, but I didn't come in like a neophyte," Segal said. "I had a good understanding. We could start our work together from 'How do we move forward faster?' rather than, 'What's the lay of the land?'"

Good communication is the cornerstone of a good ED/CEO-board relationship. And in fact, each of the senior leaders we interviewed said building communication channels ideally should begin before the new ED/CEO is hired. Domingo Barrios, for example, also was given the opportunity to meet with each of the [Heifer Foundation's](#) board members when he became a finalist in the organization's search for a president and CEO. Barrios made an effort to meet face-to-face with each board member, and despite the fact that the Little Rock, AR-based nonprofit's board members are spread across the country, he succeeded in having in-person meetings with all but one board member. His approach to these meetings was simple: He asked board members about their goals and aspirations for the organization, and then carefully listened to their answers.

Make a personal connection

Hired as the Heifer Foundation's CEO in July 2010, Barrios continues to favor personal meetings and phone calls with his board chair over email. He has approached the board about increasing the number of board meetings each year, currently two, by either adding more in-person meetings or by using teleconferencing.

“I really want to hear the voices of our trustees—literally hear their voices,” he told us. “Listening is a great building block of communication. I started building a relationship with my board from my interviews, and I took those interviews as an opportunity to begin the process of gaining trust and understanding some of the nuances of the board collectively.”

At Scholarship America, Schreck and Segal also noted that getting to know each other outside of work can make a good ED/CEO-board chair relationship even better. Although they are based in different cities, they have made it a point to learn about each other’s lives by having dinners together before meetings and meeting each other’s spouses. “I think [a more personal relationship] helps to build a stronger partnership and an understanding of where each other is coming from,” said Segal. “Then, you understand each other’s styles better, including strengths and weaknesses.”

Don’t dwell on the past

It can be valuable for a new ED/CEO to learn about their predecessor’s tenure and why the person left the job, so s/he can address any concerns the board may have. “Clearly, coming in you want to have an understanding of what happened to the prior CEO if they left under duress,” Barrios said. But he and the other senior leaders stressed that it is important that neither the new ED/CEO nor the board members dwell on the past, whether the prior leader left under a cloud or as a superstar.

For Ed Munster, becoming CEO of the [YMCA of Metropolitan Atlanta](#) in January 2009 meant stepping into a role that he had trained for his entire life. He had grown up in the Y organization as a child in New Orleans and had spent his professional career working his way up through the organization. But complicating his new job was the fact that he had spent 23 years as the Atlanta Y’s chief operating officer (COO) in the shadow of a longtime, beloved CEO. So, while Munster had a relationship with the Y’s board, it was as the organization’s operations expert and second-in-command. Munster’s challenge in the months before and after his selection as CEO was to change the way he related to board members and the rest of the Y’s stakeholders in the Atlanta community and to recast himself as the CEO.

During the search process, the board’s search committee clearly saw Munster as a top-notch candidate, but some search committee members felt they had a duty to expand the search beyond the Y movement and perhaps even outside the nonprofit sector. They changed their minds in part because of data from the national Y showing that a strong fit with the Y’s culture is critically important for new CEOs in the organization. As they went through the search process, the committee recognized that Munster’s lifelong

familiarity with the Y's culture and his financial savvy would be critical assets as the organization faced the economic downturn.

Board Chair Charlie Yates, who served on the search committee (when he was the incoming board chair), said, "In some ways, being an insider can work to your disadvantage because people know you too well. We all knew Ed was a strong operator but didn't know that he could be the strong face of the organization, particularly given our critical fundraising requirements. I don't think anybody knew what he was capable of independent from former CEO Fred Bradley. In the end, we realized that he was the only responsible hire."

After Munster was named CEO and Yates became board chair, the two men worked together on a transition, as well as getting to know each other better and learning about each other's priorities for the organization. The Atlanta Y had just started a 10-year strategic planning process, identifying both fundraising and program goals. Yates made a point to introduce Munster to both donors who could help with fundraising goals and partners who could work with the organization on programs to advance its mission in areas such as childhood obesity and early childhood education. To give Munster as many opportunities as possible to explain his vision for the organization to board members, the board began scheduling time for Munster to talk at every board meeting—a policy that continues today.

Munster said Yates' support during his transition from internal operations expert to the new face of the Atlanta Y was invaluable. "Charlie really helped build access to the community," Munster said. "It is so important to have a great relationship with your board chair right from the start. Without that, you really can't succeed."

Be frank about challenges

Scholarship America's Schreck said her approach throughout the hiring process was to stay out of "sell mode." While she was forthright about the many opportunities, she was equally honest about the challenges. "Be as true to the organization as you possibly can; let the candidate know as clearly as possible what it is you're looking for and where you see the organization going," Schreck said. "Show the good with the bad. In every adversity there is always great opportunity."

The result of Schreck's candor was that when Segal took over as president and CEO of Scholarship America, she understood the details of the organization's budget and the strategy behind every number. In fact, she was so well-versed on the budget that she encountered no unpleasant surprises in her first

few months on the job. This was particularly important given her mandate to bring change to the organization.

“Even if you were in a maintenance-stage organization, no surprises would be good,” Segal said. “But when you’re trying to make substantive change in an organization and take it to a different place, the no surprises rule is very important. You have to make quick assessments about what is and what isn’t possible, and if you’re constantly finding out things that you didn’t know, then not only does that stop the momentum, but it can set you back in terms of strategy and opportunity.”

Base the relationship on trust and respect

Barrios said new EDs/CEOs who approach a relationship with their board with a sense of fear are missing a great opportunity. “When you work from the fear side, you’re much more cautious on how to proceed,” Barrios said. “If the relationship is built on trust, you’re able to bring the experience that individual board members have to bear on all sorts of decisions.”

By establishing a collegial relationship with his board, Barrios said he is able to accomplish more toward the organization’s mission. In fact, he thinks of his board members as futurists, the people who decide where the organization should be in the future, and his role is to actualize that vision in real time. For example, Barrios learned during his early discussions with the board that two of the members’ top priorities were reducing spending and aligning the organization more closely with its sister organization, [Heifer International](#). Because he had a good understanding of the board members’ expectations coming into the job, he was able to write a report to the board after just 30 days as CEO, giving his impression of the organization and outlining the mechanics of how he planned to address the board’s concerns.

“I want to create strategies that allow trustees to bring their voices to the table—that’s why they’re here,” Barrios said. “We spend a lot of time at nonprofits bringing the best people from our communities to our boards. You want to make sure you hear them.”

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