

# THE FIVE TASKS OF EFFECTIVE BOARD CHAIRS

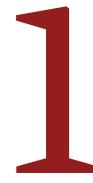
While each association is unique and each board has a different culture, successful board chairs are those who can effectively lead, facilitate, participate, partner, and protect.



**CONGRATULATIONS, YOU'VE ASCENDED TO THE HEIGHT OF POWER, THE ULTIMATE AUTHORITY—THE ROLE OF BOARD CHAIR. HOWEVER, IF YOU TREAT IT THAT WAY, YOU LIKELY WILL BE DIRECTING AN ORCHESTRA WITH NO MUSICIANS.**

So, what do effective board chairs do, and how do they do it? These are questions we often are asked when we work with board chairs—some who lead with grace and humility and some with a domineering style.

While each association is different and subject to distinct situations, and each board has a unique dynamic and culture, we have observed multiple common threads that facilitate success by board chairs in what they do and how they do it. Board chairs who are most effective operate in these five domains: lead, facilitate, participate, partner, and protect.



**LEAD THE ORGANIZATION**

Successful board chairs do many things well when it comes to leading the association. One, they advance it toward achieving its vision by focusing on the big picture and keeping the organization moving forward. This involves being mindful of strategy versus tactics—and advancing the former, while limiting discussion of the latter.

In addition, effective board chairs manage productive dissent to advance decision making by focusing on cognitive dissension and challenges while preventing emotional arguments from undermining wise decisions. Finally, they are comfortable serving in the role of encourager. Assuming the good intent of others improves trust in the boardroom and creates a positive atmosphere.

## ACTIONS OF SUCCESSFUL BOARD CHAIRS

How do exceptional board chairs act? According to our polling of hundreds of chairs and CEOs, the best ones exhibit these eight behaviors.

**THEY ARE SOLICITOUS.** They solicit or draw out the opinions of others, including (or especially) those who are introverted, reserved, or guarded in their comments.

**THEY ARE INQUISITIVE.** Their authentic interest in the thoughts and ideas of others motivates them to ask probing questions, resulting in meaningful discussion and improved decision quality.

**THEY ARE TRUSTING WITH INTEGRITY.** They have the ability to minimize the effect of individual personalities when discussing consequential decisions. This requires a level of trust, often earned through a consistent display of integrity.

**THEY ARE DIRECT.** Because they are respectful and appreciative of others' time and contributions, they choose to communicate in a direct manner. That means they don't sugarcoat or beat around the bush. However, even in their directness, esteemed leaders engage in considerate and civil dialogue.

**THEY ARE PROACTIVE.** Associations, often viewed as bureaucracies, can get bogged down in procedure and inertia. The board chair's proactive leadership can work to overcome this tendency and help advance organizational goals.

**THEY ARE PASSIONATE.** Successful chairs are enthusiastic about the organization's mission and vision. However, they balance their passion with the work of the organization and avoid any appearance of personal agendas.

**THEY ARE COMMITTED.** These leaders set an example to board members and the entire organization with their clear commitment to the work.

**THEY ARE AVAILABLE.** As much as practical, for the term of their leadership, they make service to the organization a priority. They remove obstacles to accessibility, so they are available to board members, the CEO, and others.

—Mark Engle, FASAE, CAE, and Thomas Dolan, FASAE, CAE



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# 2

## **FACILITATE BOARD MEETINGS**

Effective board chairs need to be skilled at maintaining open and free discussion during board meetings. They do not allow individuals to dominate the conversation, nor do they allow members to avoid participation.

However, “open” does not mean just anyone should be allowed to attend a board meeting. Only fiduciaries (board members and key staff) and guests invited for specific reasons should be permitted unless the organization is required to allow others to attend under sunshine laws.

Having a well-prepared agenda will help limit distractions and keep the discussion centered on relevant conversations to advance agenda items. Front-loading discussions on consequential and timely agenda topics ensures important items receive maximum attention, and it honors and respects board members’ time. Sending out meeting materials, such as finance reports, in advance and incorporating a consent agenda will also improve meeting efficiency.

# 3

## **PARTICIPATE IN BOARD MEETINGS**

Being prepared is the single most important contributor to individual board member performance. Setting that standard as board chair sets high expectations for other board members.

Your opinion matters because you may be the most well-versed volunteer in the room about issues, opportunities, and limitations for the organization. However, it’s not advisable to always speak first: Allow others to contribute and then be sure to add your perspective as a participant. Unless prohibited, it is your fiduciary duty to vote on an issue. It is important that the board sees your support for an issue and knows that you are committed to the decision.

Personal agendas undermine board performance in a substantive way. If your motives are in question or you dominate discussion, you will breach an element of your board’s trust and likely do more damage than good.

# 4

## **PARTNER WITH THE CEO**

The roles of board chair and CEO are complementary and should reflect knowledge of when to lead and when to support. Be consultative with the CEO and operate under the doctrine of no surprises for either side. Help inform each other’s decisions, as appropriate. Provide support by assuming good intent and having each other’s back. If you cannot assume good intent, you may need to pursue coaching to advance your partnership.

It is the chair’s responsibility to properly evaluate the CEO with a substantive and consistent tool. Ensuring that the compensation formula is appropriate for the expectations and performance of the CEO often



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mitigates challenging conversations. That's why it's a good idea to periodically validate your formula with a compensation consultant who is familiar with the association community.

# 5

## PROTECT BOARD AND ORGANIZATIONAL CULTURE

Safeguarding culture by creating and maintaining a trusting and productive environment between board members, between the board and the staff, and within the organization is essential. Board self-assessment tools are a great way to accomplish this.

As chief disciplinarian, the board chair is also responsible for confronting inappropriate behavior exhibited by board and association members. In cases of volunteer behavioral issues, engaging legal counsel with the CEO to help protect the organization and safeguard culture may be advisable. However, it is inappropriate to include the CEO in a disciplinary conversation or meeting with a board member.

Although engaging in difficult conversations early can stem bad behavior, few people enjoy or have skill in managing difficult conversations. That's why resources like *Crucial Conversations: Tools for Talking When the Stakes Are High* may provide a good framework for approaching these people and conversations.

Since board members are fiduciaries of the association (meaning they are legally responsible for its well-being) and are responsible for honoring best practices regarding conflicts of interest and confidentiality—as well as the duties of care, loyalty, and obedience—it is imperative that the chair set the example as a role model and ensure that other fiduciaries honor their responsibilities.

Though this role may seem daunting and fraught with requirements outside of one's comfort zone, we often hear from chairs of high-performing boards that serving in this role was a rewarding experience and the pinnacle of their career.

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