

## **Roles and Responsibilities**

A look at how the roles of the board chair and staff executive differ.

There is nothing quite like being "number 1," the chief elected officer of a voluntary organization. The implications of such a leadership role seem obvious, but it should be a memorable, enjoyable experience.

One of the chief elected officers with whom I worked as a chief staff executive put it this way: "It's fun to be number 1." It was an enjoyable experience for him - and for me, too. Most important, it was a great year for the organization.

This is a tale of two people: the chief elected officer and the chief staff executive. Fundamental to the success of an organization's elected leader is a sound understanding of how his or her role differs from the chief staff executive.

The chief elected officer may be known as "president," "chairman of the board," "chairperson," or, as often heard nowadays, "the chair." The chief staff executive may be "executive director," "executive vice president," or "president." More important than understanding the possible range of titles, however, is understanding the responsibilities inherent in the two positions.

Role of the elected leader. The chief elected officer chairs meetings of the governing board (board of directors), the executive committee, and general meetings of members. The chairperson is "responsible for the integrity of the board process," writes John Carver, a widely known authority on governance, in *Boards That Make A Difference*. A board, he states, "is a single organizational position and must officially behave as one. . . . Consequently, board officers exist to help the board do its job, not as powers unto themselves."

Carver further notes that the job responsibilities of board officers, including the chair, "serve the wholeness of governance." They do not interfere with what he calls "unitary delegation (by the governing board) to the CEO (chief staff executive)." He says unequivocally that "the chair is not responsible for the functioning of the organization nor for the quality of the CEO. The chair is responsible for the functioning of the board, which ordinarily proves to be job enough!"

Role of the executive officer. The chief staff executive has clear responsibilities, too, including assisting the chair in every possible way. The chief staff executive's principal responsibility is to oversee staff work in carrying out the policies and directives of the board of directors, which is headed by the chair.

An oft-quoted and oversimplified but accurate distinction between the roles of the board chair and the staff executive offers this insight: "The board is responsible for policy and direction of the organization; the staff is responsible for implementation." Never-ending details and lower-level issues will surely enervate the governing board as well as the chief elected officer. Their time and energy instead need to be directed exclusively toward policy issues that will guide the direction of the organization. The staff's role is to implement board decisions. Although there's a lot more to understanding how the board and staff work together, the basic distinction is that

simple.

An effective relationship. Before discussing a detailed job description for the chief elected leader, it's important to touch on the relationship between the board chair and the staff executive. To begin with, the relationship must be essentially collegial - one of mutual appreciation and understanding. Each must respect the power and role of the other. Collegiality may be easier to achieve when the two get along well, but it can and should exist in any event.

A matter of orientation. Most chief elected officers, having served as members of the governing body, will be comfortable with the board process and, most likely, have come to know the chief staff executive well. Sometimes either or both parties, chief elected and chief staff, have the idea that since either or both is so experienced in serving the organization in earlier roles and relationships, orientation is unnecessary. This is never the case.

Orientation is always necessary. It is essential to building a spirit of collegiality. And, it is critical if the year in office is to be as productive and enjoyable as possible.

Orientation is not a matter of reading a simple job description. It is a thorough discussion between the two principals of each item in that job description. The orientation process needs to include:

- \* a visit to the headquarters of the organization;
- \* a thorough briefing on the roles of key staff members; and
- \* a review of bylaws, operating and management policies, and the responsibility and role of each principal as spokesperson, and, if applicable, the role of the spouse of the chief elected officer.

Nothing helps build understanding and collegiality more than the enrollment of and participation together of both the elected leader and staff executive in the American Society of Association Executives' popular Symposium for Chief Elected Officers and Chief Staff Executives, a two-day educational program (for information, call (202) 371-0940). If at all possible, schedule attendance 90 days (or fewer) before the chief elected leader takes office. Thousands of happy "graduates" can attest to the efficacy of this learning experience.

The job description. The actual delineation of function, duties, responsibilities, and authority of the chief elected officer is usually found in the position description, which should be a part of the policies and procedures document, having been approved by the board of directors. It is important to note that all items in this description need to address the chief elected officer's role in fostering the integrity of the board process and achieving effective functioning of the board as policy and direction maker.

A sample description. The following is a typical statement, adapted from the position description for the elected president of a successful association. If necessary, you may be able to fine-tune it to fit your own organization.

Basic functions: The president shall be the chief elected officer of the association and serve as chair of both the board of directors and executive committee. The president shall serve as a nonvoting ex-officio member of all committees, standing or otherwise, except for those committees to which he is appointed a full member with voting privileges.

The president shall exercise personal leadership in the motivation of other officers, board members, committee chairs, committee members, and membership, and influence the establishment of goals and objectives for the organization. He/She shall act as spokesperson and inspirational leader and shall work in partnership with the executive vice president. Duties, responsibility, and authority. The president:

- \* presides at and attends all meetings of the members, board of directors, and executive committee, and coordinates agenda material with the executive vice president.
- \* in concert with the executive vice president, sees that the board of directors, executive committee, and officers are kept fully informed on the conditions and operation of the association.
- \* works with the executive vice president in seeing that basic policies and programs designed to further the goals and objectives of the association are planned, formulated, presented to the board of directors, and executed following board approval.
- \* supports and defends policies and programs adopted by the membership, board of directors, and executive committee.
- \* promotes interest and active participation in the association on the part of the membership and reports activities of the board and association to members by means of letters, publications, or speeches.
- \* with the executive vice president, acts as a spokesperson for the association to the press, the public, legislative bodies, and related organizations.
- \* presents an annual report at the annual meeting on the "state of the association."
- \* exercises general supervision of the work and activities of the association board, executive committee, and other association committees.

There's a lot to keep in mind as all embark on the adventure of being an active part of your board of director's. Knowing the basics will help make it an even more enjoyable experience than it already promises to be.

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