Staff and Board Roles

The Role(s) of Staff

Many groups operate without ever having paid staff. For lots of other organizations, the staff are the key drivers of the organization's activities. We rely on staff for a million-and-one things, namely to keep the organisation functioning and working towards its mandate. They often coordinate activities, operations, planning, and ensure that work plans or organizational objectives are met.

This can work in a traditional hierarchical model with an E.D. Who makes most of the organizations key decisions, but it can also work with a more collaborative structure where many people are implicated in decision-making.

The Role(s) of a Board

Every organization needs to look carefully at its own needs and define the board's role based on its own unique reality. Boards work in very different ways depending on the needs of an organization at a given time. That said, it is widely accepted that a board's primary role is to **provide oversight**. This means focusing on the long-term health of the organization and maintaining a bird's-eye view of its work and operations, leaving others to tend to the day-to-day responsibilities of program implementation and people coordination. A healthy oversight role typically involves the following tasks:

- Nurturing a culture in which collaborative leadership, continual learning, and transparency are broadly and deeply practiced. The more democratic and engaging an organization is, the more sustainable it becomes because the knowledge and skills needed to run the organization successfully are shared among many (staff, volunteers, members), rather than being concentrated in a single person who might leave at any time.
- Serving as an unwavering source of support for the staff, while at the same time helping them reflect, question, experiment, and surface underlying assumptions.
- Reviewing quarterly statements and approving the annual budget.
- Approving internal policies.
- Revisiting the organization's mission, vision. values and approach, in collaboration with staff, to ensure that they are still relevant and that the organization's programming is in harmony with its mission.
- Engaging in organization-wide evaluations, in collaboration with staff.
- Engaging in strategic thinking and planning, in collaboration with staff.

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– Making sure that there is a strong process in place for making decisions about influencing public policy.

While maintaining a focus on their oversight role, it is quite normal for Boards to **assist with some aspects of day-to-day operations**. Here are a few common situations that tend to call for more Board involvement:
– Efforts to increase member involvement (ex. planning and implementing an AGM)
– In the founding years when there are no (or few) staff members and organizational processes and procedures are in their infancy.
– Fundraising efforts, especially during periods of intense financial vulnerability or growth (ex. capital campaign activities, fundraising events, donor relations).
– Influencing public policy (particularly when it involves taking a public stance)
– Nurturing community partnerships and visibility.
– When individual board members have skills or knowledge that the staff do not have (ex. a lawyer on the board might become heavily involved in the purchase of a building).
– When inter-personal conflicts cannot be resolved at the staff level.

And finally, although few and far between, there are some situations that call for the Board to **make decisions at an operational level**:

– Signing contracts of salaried employees.
– Hiring, firing, and evaluating an Executive Director.
– Stepping in during periods of crisis and staff transition when all else fails (ex. empty ED position).

Sustaining a healthy level of board involvement is an art, not a science. Even the most well received instances of hands-on board involvement can slip into an unhealthy long-term pattern of micro-management. On the other hand, boards that maintain a rigid, arms-length relationship to the staff can have a difficult time functioning effectively and can feel very disempowering, both for board members and staff. Trust and open communication between staff and board members are important parts of ensuring a fruitful and effective board experience.

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