Learning on the Run 15
How can you reduce role conflicts between a Board of Directors and a senior leadership team?

The Request. The president of the Board of Directors for a non-profit veterans service center requested that we facilitate a retreat for the Board and Senior Staff. The senior staff believed that the board was making decisions that the staff should be making. The Board President wanted some of the retreat to be focused on this conflict in perception about what were the appropriate and expected roles of the Board and Senior Staff.

Larger Context. Several members of the ten person board were relatively new. These less-tenured board members were unclear about where board authority ended and staff authority began. Senior staff felt that they lacked credibility with the board and weren't seen as experts in their own service areas (e.g., Housing for Homeless Veterans, Drug Rehabilitation, etc.).

Consulting Intervention. After a pre-meeting with both Board and Staff to agree on retreat goals and groundrules, we created and facilitated a process to work the Board-Staff differences in perception.

After an icebreaker, individual senior staff briefed the rest of the participants on the most innovative programs and recent and future trends in their service area. This was followed by a short Q & A. After all the presentations, trios discussed and reported on the implications for what they heard. Action ideas were recorded.

The process we used to discuss decision authority was a modification of the images exchange method (see Image Exchange Case Study, Learning on the Run 4). We asked the senior staff and the board to discuss separately three questions:
1. What was their understanding of what decisions that were their own to make?
2. What decisions were they to be consulted prior to a decision?
3. What decisions did they need to be informed about?
Similarly, they were also asked to discuss and report on what they thought the other group's decisions were and to what extent were they involved in making specific decisions. After the report out, the common ground among everyone became agreements of decision authority. The most important differences that remained were given to heterogeneous board-staff problem solving teams to generate recommended actions. The whole group was given an opportunity for input and, in some cases, confirmation and agreement.

Last Line. Having everyone exchange perceptions of role and decision authority helps to clear up misunderstandings and calls attention to situations that may need further work.

Commentary: We missed an opportunity for the group to apply their decision making agreements. We might have asked the group towards the end of the retreat to review those action ideas that came out of the future trends presentations. The review would be to determine the decision authority of the Board and the Staff with respect to each action. In that way, the whole group could have used those actions to further clarify decision making.