



The talent will take you there.

Board Chair and Executive Director

Partnership Assessment

Resource

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The board chair and the executive director must be each other's biggest fans and greatest critics. The health of this partnership is essential to a well functioning organization.

This resource is designed to assess the current status of your Board Chair-Executive Director relationship (your pair). It is based on the findings of Mary Hiland in her article [The Board Chair-Executive Director Relationship: Dynamics that Create Value for Nonprofit Organizations](#) (2008). The included questionnaire is to be completed after reading the article. Its purpose is complementary to her research findings and will allow you to not only assess the current status of your relationship, but also identify opportunities to develop it further.

Assessment Questionnaire

Suggested procedure: Answer the questionnaire privately and candidly, with the idea that you might never share the answers. It's important to self reflect on your TRUE answers here so you can decide whether you wish to improve the relationship and what steps you are prepared to take for that purpose.

If you decide that sharing your answers to the questionnaire with your pair is a step to developing your partnership, then you may wish to compare and discuss your individual answers.

Interpersonal Dynamics: What do you do?

Level	Behaviors Observed	How often can you and other people see your pair displaying these behaviors? You must identify one level as "Most of the time"			
		Never	Some of the time	Most of the time	All the time
1. Fact-sharing	One-way giving of information that does not involve the engagement of the other party in exchange. Amount of information shared from the executive director to the board is experienced as enough.	1	2	3	4
2. Ideas-sharing	Brainstorming, problem solving, and/or thinking things through together, a two-way exchange. Initiated by either party. Focus ranges from quick checking to consulting of each other about organizational issues. Sounding board. Can come from each side.	1	2	3	4
3. Knowledge-sharing	Learning and/or coaching interaction. A teaching component, learning something about the organization, something outside the organization or the person him/herself. Can be done to and from each side.	1	2	3	4
4. Feeling-sharing	Expression of support, reassurance, caring and/or appreciation. All or some coming from each side.	1	2	3	4

5. Give and take	Adaptation to the other person’s style, personality and/or preferences. Evidence that both parties in the relationship make changes and concessions to accommodate the other or to achieve alignment.	1	2	3	4
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- A. How satisfied are you with the **current level of sharing** achieved in this relationship?
- B. If not satisfied, where (at what improved level) would you like to see the relationship evolve?
- C. What would be necessary to achieve this progress?
 - a. On your part?
 - b. On the other party’s part?
- D. What is the most potent step you could take to contribute to such an improvement?
- E. Are you committing to take this step? If so, when will you do it?

Strength of Trust: From cautious to shared identity

Level	Behaviors Observed	How often can you and other people see your pair displaying these behaviors? You must identify one level as “Most of the time”			
		Never	Some of the time	Most of the time	All the time
1. Calculus-based trust	Partners are cautious and consider the costs and benefits of engaging further in the relationship. Weak level of trust but sufficient to accomplish goals.	1	2	3	4

2. Knowledge-based trust	Partners know each other to an extent that facilitates predictability. Parties have seen or have confidence in each other’s competence, demonstrate respect for one another, communicate together effectively, honor agreements and commitments.	1	2	3	4
3. Identification-based trust	Parties identify with each other and internalize each other’s preferences. They can act on behalf of each other and can substitute for each other in other interpersonal interactions.	1	2	3	4

- A. How satisfied are you of the **current level of trust** you see/feel in this relationship?
- B. If not satisfied, where (at what improved level) would you like to see the trust evolve?
- C. What would be necessary to achieve this progress?
 - a. On your part?
 - b. On the other party’s part?
- D. What is the most potent step you could take to contribute to such an improvement?
- E. Are you committing to take this step? If so, when will you do it?

Focus of Work: The things you work on together

Level	Behaviors Observed	How often can you and other people see your pair displaying these behaviors? You must identify one level as “Most of the time”			
		Never	Some of the time	Most of the time	All the time
1. Managing	Working on some aspects of the organization (finances, personnel, facilities, fundraising). Working on or about the Board (developing Board meeting agendas together, working on recruiting board members, identifying Board leaders to head committees).	1	2	3	4

2. Planning	The pair engages with the Board in determining direction and strategy, as well as doing other activities related to organizational strategic focus. The pair builds relationship with Board members and interacts with Board committees.	1	2	3	4
3. Leading	The pair works with an engaged board focused on mission-related and strategic work. High level of engagement of the pair with the external community. The pair helps create engagement between their Board and the community.	1	2	3	4

- A. How satisfied are you with the **current level of work** your pair is doing together?
- B. If not satisfied, where (at what improved level) would you like to see this evolve?
- C. What would be necessary to achieve this progress?
 - a. On your part?
 - b. On the other party's part?
- D. What is the most potent step you could take to contribute to such an improvement?
- E. Are you committing to take this step? If so, when will you do it?

About Vantage Point

Vantage Point offers leading-edge learning opportunities for not-for-profit executives and boards of directors. We work with you to attract, meaningfully engage and integrate the abundance of talent available to you. By mindfully engaging passionate citizens you can stretch budgets and human resources further to create an abundant not-for-profit.