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Briefing Notes: Board-Staff Dynamics and Natural Entry Points for Connection

Two Cultures

Board and staff live in different micro-cultures, even as they share the mission and work of a particular organization. Some of the differences are noted below:

Board Characteristics	Staff Characteristics
Peer	Hierarchical
Voluntary	Salaried
Part time, episodic	Full time, continuous
Secondary commitment, one of many	Primary commitment
Powerful actors	Influencers
Predominately collective	Mix of collective and individual
Strategic and policy focus	Mix of strategic and operations

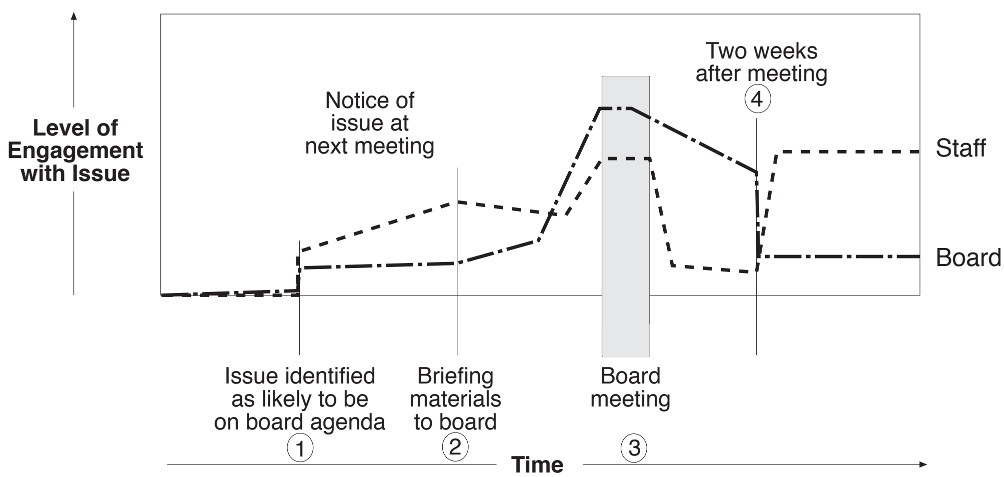
One of the greatest challenges when the board and staff come to do joint work is managing the transitions into and out of the intense collaboration that any particular event—such as a board meeting or a subcommittee meeting—represents.

The scarcest resource is attention. Marketing thinkers are increasingly focusing on the "battle for mind share." In our experience there is a predictable pattern to the interactions between board and staff, especially around big meetings or retreats. This pattern embodies both opportunities and risks for the board/staff relationship.

The Typical Pattern Around Board Meetings

Following is a "rhythm strip" that measures the levels of engagement of board and staff in a typical meeting cycle. The usual pattern is depicted as follows:

Variations in Board and Staff Attention to an Issue



For a particular issue, the cycle starts when it is identified (usually by staff) as likely to be on the board's agenda. This is indicated as 1 on the chart. Often with relatively little engagement of any board members except perhaps the chair, staff do a work up of the issue for inclusion in "the board book." Thus for staff, getting the book ready for the board can entail moderate to high engagement, often with format and style dominating substance. Multiple drafts are not uncommon and horror stories about typos motivate a care bordering on compulsiveness in producing the advance materials.

Once the book is sent out (2 on the chart) staff experience a sense of relief, and often get quickly back to the work that was put off in order to focus on meeting preparation. On the other side, when board members get the book (a week or so in advance), they often glance at the agenda and perhaps one or two sections of particular interest but put off "getting ready" until they are in transit to the meeting. As a consequence, the most prepared board members are often those who travel the furthest—because they have had more time to review the materials.

At the board meeting (3 on the chart) both board and staff engagement peaks. As in a sporting event, staff are energized by the conversations, the questions and the challenge to communicate clearly. In turn, the board is often infected by the staff's energy and their colleagues' thinking. However, most board members find that meetings tend not to provide adequate time or opportunity to express all the ideas and considerations that are stirred up.

In the period immediately following the board meeting (between 3 and 4 on the chart), we believe that there is a phase lasting from two days to a few weeks at most, where the issues and afterthoughts from the discussions remain salient. This stage is characterized by a mix of heightened interest and guilt. The interest comes from the focus on substantive issues of importance to the organization. The guilt stems from the feelings of most board members that they could and should "do more" for the organization—that their passion for it exceeds the time they have to demonstrate that caring.

We view this period as particularly fertile for deepening the board and staff connection. However, this opportunity is often missed because the staff's sense of relief and their need to get back to other tasks leads them to disengage from the issues of the meeting. It is not uncommon for senior staff members to deliberately schedule vacations immediately after a board meeting.

Usually several weeks later, staff become moderately re-engaged as they produce minutes of the meeting and take follow-up actions on various items. By this time, board members have become reabsorbed in their other commitments and have a much less vivid recall of the particular issues that had engaged them.

Suggestions for Staff to Capitalize on Opportunities for Deepening the Board-Staff Connection

Before the Meeting

1. Involve individual board members more in agenda item selection and preparation. As staff begin to identify issues for inclusion, they should ask who on the board brings the most interest or knowledge to this issue. Consulting with that individual about what materials to include, how to frame the issue, and what advance questions would help the board members can create a desirable state of affairs in which each item has a productive board-staff pair as the champion for its cause. This can better focus the staff preparation and perhaps prevent overpreparation and overloading board members.
2. In preparing materials, staff should steer between understaffing and overstaffing. If an item has been completely researched and analyzed to the point of a final recommendation, board members often feel that the staff really only want ratification, not real discussion, and the request for guidance will seem inauthentic. Conversely, board members need sufficient background and context to allow them to make informed judgements and contributions.
3. Staff should take as much care with the framing and charging memoranda as with the materials supporting an issue (CFAR, 1994). A common pattern is to spend so much time preparing materials that the transmittal is perfunctory. When this happens, staff members are fully engaged with the vitality of the issue, while board members are confronted with a pile of paper. A good transmittal memorandum should help a board member make the shift from low to moderate engagement. It might include the following: an overview of what is in the materials, why they are being transmitted, what decisions or conversations will be based on these materials, what point of view might be best for the board member to bring to the text, and if pressed for time, what to concentrate on.

4. A powerful device for getting greater board engagement is to assign different materials to different board members. For example, three board members might be asked to focus on a particular agenda item and the relevant materials and to lead the discussion. Alternatively, each might be asked to lead a subgroup or to interview a key external resource who may or may not be at the meeting. Active involvement creates risk, which in turn motivates people to become engaged. This results in every issue having a few champions and gives the board members both leading and support roles in a session.

In the Meeting

1. When an item is presented, staff should err on the side of underpresenting versus overpresenting materials. Too frequently, staff spend 90 percent of the time in the meeting getting the board up to speed and then lack the time to harvest the board's readiness to engage. A brief introduction to focus on the desired results can jumpstart the conversation. Board members can then request more information as they experience the need. There is a vast difference in engagement when a board member pulls more information from staff, versus staff pushing information out unasked.
2. Staff should allow silent skimming of relevant materials and time to collect thoughts. Research on meetings (Oppenheim, 1987) has shown that preparation immediately before discussion leads to deeper and wider engagement. As little as three to five minutes are needed to skim a document or to recall thoughts. The time also allows final framing of a response to questions from the transmittal note, for example: "What are the two to three options you think would be best for us to investigate further and why?"
3. The chair of the meeting and staff should work to get *conversation*. Boards often fall into a hub-and-spoke dynamic in which a presenter or the chair becomes overly central in a discussion. As each board member makes a point, there is a response from the presenter or chair. However, we know that peer conversation is always energizing to boards. Conversation yields learning, engagement and commitment.
4. Use the One-minute Essay. This technique was developed at Harvard to enliven large lecture courses. At the end of a session, participants are asked to jot down a few key points based on the discussion. One might ask: "Based on the conversation, what would you see as the two most critical next steps?" This can gather the ideas that were not expressed in the discussion, for lack of time, opportunity or inclination. If the notes are typed up and shared soon after the meeting, board members typically value the opportunity to see how their ideas fit with those of their colleagues. These one-minute essays also provide material and pretexts for staff to reconnect with board members in the week or two following the meeting.

After the Meeting

1. Staff should assemble for an immediate debriefing. Often, release from the stress of the meeting leads people to disengage entirely. However, this is an optimal moment for reflection about:

   - The design of the agenda and activities in the meeting.
   - The dynamics that took place.
   - The revealed interests of board members.
   - The performance of presenters.
   - The choices made and decisions taken on issues.
   - The quality of the background materials.

   It is vital to grasp the opportunity to identify the things learned while they are fresh in the memory, so as to incorporate them into future meetings.

2. Individual consideration should be given to particular board members and their interests. Because a board is a collective, we tend to underdifferentiate the people that comprise it. Thinking about individual members right after intense contact makes it easy to identify particular passions and concerns and to conceive of ways to harness those in the future. Quick follow up with board members will anchor their interest more deeply. It also collects insights and afterthoughts that come to us just after an intense experience (what the French call "Staircase Wit"—*l'esprit de l'escalier*).

3. Meetings and retreats can easily become "lost weekends" if there is not some followup back at the board member's "real job." Follow-up options include:

   - Further interviews on a single topic or narrow set of topics.
   - Provision of additional background material to increase the board member's ability to be an effective thinking partner in the future.
   - Asking a board member to review a particular follow-up document prior to its wider dissemination.

   Specific tasks can be assigned to staff members to facilitate rapid followup. As the "rhythm strip" shows, the one or two week period following a meeting is a time when staff efforts can have unusually high impact.

Conclusion

Our experience with boards has shown that many board members feel underused by the organizations that they oversee. Conversely, staff frequently feel that the time they spend preparing for board meetings would be more productive if devoted directly to the key issues facing the organization. There are ways to reconcile these divergent experiences. Effectively staffed, boards can move beyond traditional oversight and audit roles (Charan, 1998). Boards can become partners with staff in thinking and acting in their organization's interest.

References

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Oppenheim, Lynn. *Making Meetings Matter: A Report to the 3M Company*. Philadelphia: CFAR. December 15, 1987.

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