



LEADERSHIP
MONTGOMERY

Navigating Board
Expectations, Conflict, and
Succession Planning:
A presentation for NCJW

Meet the facilitators

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Agenda



- What it means to be a board member
 - Overview of roles and responsibilities
 - Communication and expectations
- Organizational/interpersonal conflict
 - Recognizing the source of conflict
 - Courageous Conversations
- Succession planning
 - Policy
 - Onboarding and transition(s)

Overview of Roles & Responsibilities of Board Members



Job Descriptions

Job descriptions assist the board members in feeling comfortable in their roles as officers of a nonprofit organization in that it manages expectations on both ends. Board member job descriptions include:



Importance of term limits

- **Setting term limits** is a **best practice** of sustainable and successful boards. *The most common board member term structure is two consecutive three-year terms.*
- A **staggered term system** allows a certain number of new members to be chosen each year, preventing no more than one half (preferably one third) of the terms from expiring at the same time.
- **Without any term limits**, some board members **may serve 20 to 30 years** on one board.

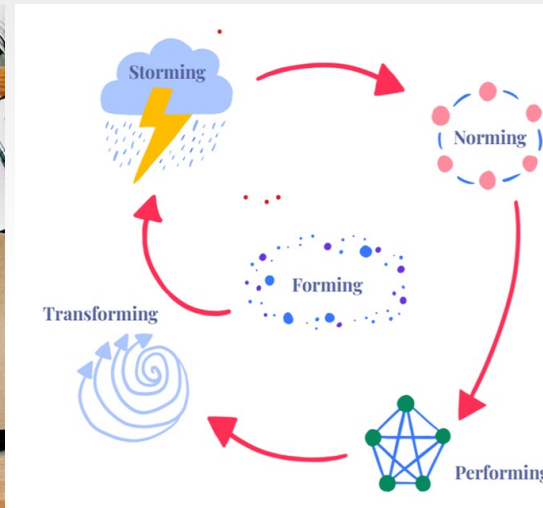


Organization Representative

Nonprofit board members play a vital role in helping to determine how that nonprofit shows up in the communities that they serve. Nonprofits have the distinct moral responsibility to provide services that reflect the needs of the communities that they serve.



Organizational/Interpersonal Conflict



Communications and Expectations

Board members have a serious responsibility to serve the nonprofit and ensure that their needs are met so that they can operate successfully. A failure in communication can lead to negative consequences for the nonprofit. Being intentional about communication is key!



Organizational Conflict Resolution



Organizational conflict is a state of discord caused by the actual or perceived opposition of needs, values and interests between people working together

Types of Conflict

Intrapersonal Conflict

Conflict we experience within ourselves



Interpersonal Conflict

Conflict that involves two or more people

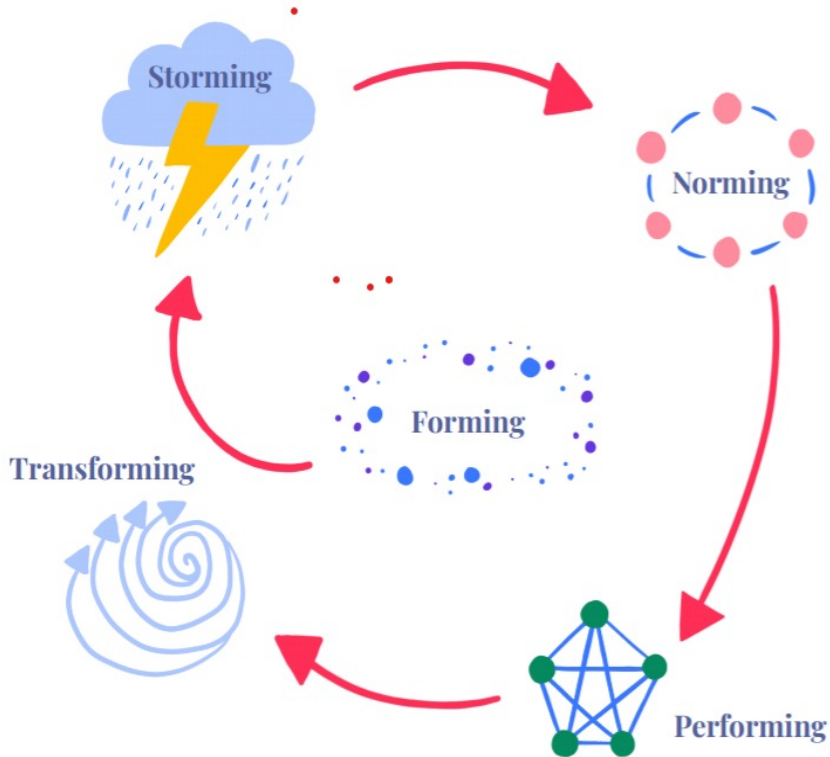


Intragroup Conflict

Conflict between members of a group



4 Stages of Group Development



Every group experiences common stages of development. Each of these phases are a typical part of the group's maturation process that can lead to building trust and achieving group goals.

4 Stages of Group Development

- **Forming:** Everyone is on their best behavior, working to figure out what shared expectations are. Everything is new.
- **Storming:** Sorting out how to work together, different opinions are expressed, initial conflicts may arise.
- **Norming:** Working through their differences builds trust. The group is discovering their norms.
- **Performing:** Roles and relationships are established, the group is able to work on achieving their goals.
- **Transforming:** The group transforms, which can mean the project is complete so the group disperses, or may mean the initiative is reshaped, with new goals and/ or group members added.



4 Archetypes in Conflict



Victim

Believes they are powerless, believes it is being used against them. Fearful of power.





Warrior

Believes that they have to fight to get power that others have. They feel suspicion and mistrust.

Leader/Healer

- Believes that power is available to them and sees the possibilities in others. They feel confident.



Creator

Believes that power is everywhere and flows within and around in mutual relationships.



Conflict Habits that Undermine Trust, And What to Do Instead

Undermines Trust	Generates Trust
Personal Criticism	Affirm valid feelings and needs
Defensiveness	Practice Appreciation
Contempt	Take Responsibility
Stonewalling	Soothe & Create Boundaries

Domination vs. Mutuality

We live in a world shaped by hundreds of years of collective, structural harms (the legacies of brutal colonization, slavery, patriarchy) that shape the culture we live in. That means these patterns have shaped us too, and we must assume they are present in our relationships. To release the patterns of domination and violence, it's helpful to acknowledge how we may have internalized them and be unconsciously acting them out.

There are also hundreds of years of non-dominant cultural practices of caring, interdependence, and resilience that we can each draw on to cultivate a life-giving culture! When we are proactive about reflecting on these dynamics, and talking about them regularly, we become more aware of when our behaviors are shaped by dominant culture.

Dominant Culture Patterns



- Exceptionalism
 - ✓ Power and control
- External validation
 - ✓ Quantification & Measurement
- Binary thinking
 - ✓ Right vs Wrong

Cultivating Mutuality: Good for me, Good for you



- Acknowledge Power (in all its manifestations)
- Lead With Purpose, Practice Values
- Appreciate our Diverse Strengths & Evolve Together

Let's Check In

It's breakout group time! We'll put you in groups of three (3) to discuss the following:

- 1. My board is in which stage of group development?**
- 2. What patterns or characteristics show up across our board?**
- 3. What patterns or characteristics show up in me when I experience conflict?**

Courageous Conversations



- Courageous Conversations involve taking a risk to name and hear potentially difficult truths.
- When we are intentional about setting the right tone, the potential for positive outcomes increases.

Guiding Courageous Conversations

- Prepare your POP (purpose, outcomes, process)
- Examine your contribution
- Practice
- Set the conversation up for success
- Practice deep listening
- Practice skillful communication
- Deal with breakdowns
- Ensure good completion



Board Succession Planning

Strong board leadership is vital to the success of a nonprofit and succession planning helps to maintain that. Succession planning outlines the process that a board and committees should use for replacing board members because of existing or future vacancies. Develop an internal vision for succession planning



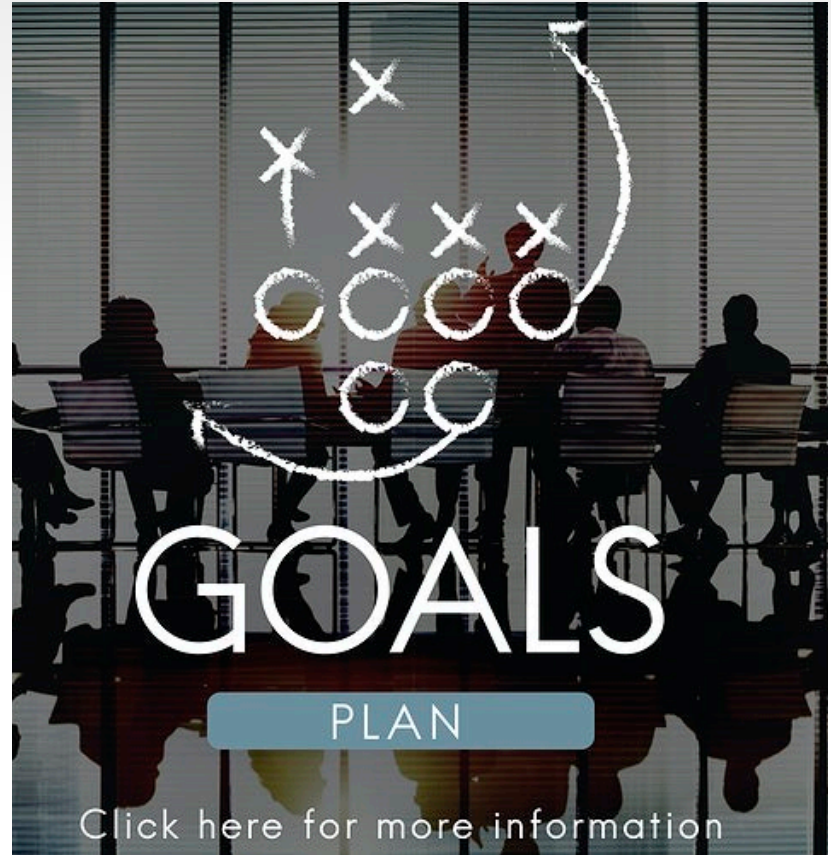
Succession Planning Checklist

- Form a nominating and governance committee.
- Establish a plan for emergency leadership vacancies.
- Establish a plan for planned vacancies.
- Develop a recruitment plan.
- Identify potential internal candidates.
- Identify potential external candidates.
- Establish a plan or orientation and onboarding.




Onboarding/Orientation Checklist

- Program
- History
- Strategic Direction
- Finances
- Organizational Structure
- Board Roles & Member Responsibilities
- Board Operations



Thank you!



“Beyond the duties of care, loyalty, and obedience, there is, I suggest, a fourth board duty: the duty of imagination.”

-- Alice Korngold

Leader to Leader Journal, Spring 2006

<http://tinyurl.com/kk782sb>