Beyond the Organizational Chart: Board-Staff Relations in Healthy Congregations

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Congregational leaders, much like those of any other kind of institution, love organizational charts! They are especially fond of those diagrams that show "who's in charge here," particularly where their own position is close to the summit of a pyramid, while carefully delineating the roles and responsibilities and the key players. Unfortunately, human institutions are rarely characterized by such neatness and clarity. In fact, religious communities may well be among the messiest and most complex – let's say "most organic" – of all human organizations. The religious community, by whatever name we call it, is one where it is difficult and at times nearly impossible to distinguish between owner and customer, donor and recipient, member and participant, or leader and servant. Congregational life defies neatly constructed organizational charts, even as it requires a high degree of organization!

Short of drawing a three-dimensional diagram of overlapping circles, misshapen boxes and erratic lines, the most useful and accurate organizational chart, insofar as formal structure is concerned, will juxtapose the board and staff of the congregation alongside one another – in other words, it will show them in partnership. In most congregations, the clergy live and work on both sides of the chart, participating actively in the board's work and deliberations while also guiding the staff, serving as a link between board and staff while simultaneously maintaining the appropriate distance between them. The clergy are unique in congregational organization in that they have a direct relationship with the congregation itself, its board, and the remainder of the staff. (It goes without saying that, in most traditions, the clergy is also held to have a special relationship with God or whatever that tradition's source of authority may be.)

Perhaps the most obvious factor in defining how the board and staff of a congregation relate to one another is the polity of the denomination to which it belongs. At one end of the spectrum are those congregations that are either fully independent or part of one of the congregational traditions, at the other end are those whose polities are episcopal, while in between are those traditions that blend these divergent tendencies. In the United States and Canada, the episcopal denominations have absorbed many of the assumptions of congregational polity, so strong is the influence of the prevailing democratic values of the culture, not to mention the impact of consumerism. Consequently, even advisory boards (as distinct from true governing boards) have considerable influence on what happens in their congregations, although their polity may vest primary authority in other places. The net result is that most North American congregations possess considerable autonomy and their boards wield real power in guiding their affairs.

Although structure and systems are important factors in the governance of religious organizations, personalities will generally prove to be more significant. Simply put, mature and faithful people can make almost any organizational structure work, whereas the best structure will crumble if it is led by individuals lacking in personal maturity and the gifts of leadership. When a particular individual fails to adhere to normal protocols or otherwise acts in ways that undermine healthy relationships, it is unhelpful for peers to ignore the behavior. In the case of board members, it is a responsibility of the board as a whole to protect the staff from board members acting on their own personal agendas. In the case of staff, it is the responsibility of the staff member's supervisor or work group to hold the staff member to professional standards of service.

Just as good fences make good neighbors, good boundaries between the organizational parts of a congregation do make for good relationships. However, it is necessary to avoid excessive rigidity about these boundaries. Few of us would choose to live in a neighborhood where the fences had no gates, so we should be suspicious of any governance model that defines boundaries so neatly and tightly that there are few opportunities for direct interaction between the parts. It would be like building organizational fences without any gates, or with too few gates for the length of the fence. Nowhere is this more important than when it comes to the relationship between the board and the staff of a congregation. One often hears the call for these two spheres to be kept neatly separated, a sentiment that is expressed in many different ways: ministers and parishioners can never be friends, the board has no business meddling in staff matters, the staff should stay out of congregational politics, members should never be hired to fill staff positions, the board should avoid micromanagement, the minister has no business talking to the nominations committee, and so on. While some of these assertions may have limited usefulness, they are often rooted the congregational equivalent of urban legends and tend to promote turf protection rather than good boundaries and healthy relationships.

In practice, there's really no reason why socially competent people cannot cross the boundaries from time to time, especially when doing so promotes deeper understanding and more harmonious relationships, as long as they do so in a respectful manner and with the others' consent. It is undesirable to allow a congregation's relational etiquette to be determined by fears about the socially inept. It is far more productive to keep the relationally challenged individual off the board and out of the staff in the first place, something we seem loathe to do in religious organizations!

Staff members need to understand that one of the rewards that board members receive for their service is, in fact, the privilege of having a closer relationship to the staff of the congregation, who are usually perceived to be at the center of activities. While it's natural for staff members to want to keep board members at a distance from their day-to-day work, it is highly desirable for staff to nurture respectful and clear relationships with board members.

Board members should never exploit staff relationships to accomplish things for which they cannot get approval from their colleagues on the board. Similarly, individual staff members should not manipulate board members to implement through board action what they cannot get the senior staff to agree to.

In many traditions, ordained ministers are called to their positions by a vote of the congregation rather than named by denominational appointment or hired by the board. Where this is the case, it is essential to recognize that the minister (or ministers) have a direct relationship to the congregation as a whole and are ultimately accountable only to the congregation. While they may have a reporting relationship to the board, they are not directly accountable to the board for their ministry and its customary responsibilities – preaching and teaching, pastoral care and public witness. However, they may be held accountable by the board for board-delegated responsibilities, such as the supervision of other staff, management of congregational funds, and implementation of board policy.

The size of a congregation is an important variable in determining the appropriate relationship between the board and staff. In the family-sized congregation (those averaging fewer than 50 participants), the board *is,* for all intents and purposes, also the volunteer staff of the congregation! Since the board of such a congregation fills what amount to staff roles on a volunteer basis, the question of board-staff relations is pretty much an internal conversation. The board of a family-sized congregation will commonly focus its attention on recruiting and motivating a volunteer pool of which the board's own personnel will be the dominant number.

It is in those congregations that grow beyond family-sized systems that the question of board-staff relations takes on real importance. In a pastoral congregation (averaging 50-150 in attendance), so called because its relational system typically focuses on a minister (or pastor), board-staff relations are initially framed as a matter of communications and accountability between the board and a solo minister. In such a context, it is difficult not to "take things personally" in both the positive and negative senses of that expression. The most dangerous thing a board can do in this case is seek to supervise the daily work of the minister, while the most dangerous thing for the minister is to allow an adversarial relationship with the board to develop and fester.

As soon as a congregation reaches the size where it is able to hire a single paid staff member, its board must learn to relate to the staff in a single voice. It is neither appropriate nor helpful for individual board members – not even the chairperson – to arrogate to themselves the privilege of supervising the staff. This can be especially difficult in the pastoral congregation, since most board members will continue to function, in some way or other, as volunteer staff members.

In program churches (150-350 in attendance) and large congregations (350+), the board-staff relationship changes dramatically, since congregations of this size undergo an increase in organizational complexity, demand for specialization, program growth and autonomous groups, and evolve towards having multiple professional staff and a cadre of support staff. While the staff will typically adapt more easily to the trend toward specialization, the board needs to understand that its role also becomes more specialized, requiring greater focus and a more limited sphere of activity.

As congregations grow to the size where board members are no longer expected to double as volunteer staff, the board is left with six primary functions: visioning, policy-making, stewardship, sponsorship, advocacy, and consultancy. Visioning and policy-making should be its dominant focus, since a clear and compelling vision will set the stage for everything else that happens, while well-crafted policies extend the board's influence throughout the entire congregation. (If a congregation's bylaws are thought of as its skeleton, then its policy framework can be imagined as the regulatory system that keeps the vital organs in check!) Neither of these two functions can be effectively pursued without a close and trusting relationship between the board and the senior staff of the congregation. If the senior staff is isolated from the board, it will be effectively insulated from the results of the board's work in these areas. As stewards, the board holds the congregation's assets in trust, including moral and other intangible assets, while as sponsors, the board should collectively be among the most generous supporters of the congregation with both time and money. As advocates, the board represents interests of the congregation as an institution both to its own members and, more importantly, to the wider community. As consultants, board members are available to the staff – *at the staff's initiation* – to provide counsel and encouragement from their particular areas of expertise. It is the unfortunate tendency of many boards to neglect the first two functions and devote excessive energy to one or more of the remaining four. As stewards and consultants, in particular, board members can be very tempted to interfere in the staff domain, even when seeking to be genuinely helpful to the staff.

In multiple staff congregations, the board should generally restrict its involvement in staffing decisions to policy directives. The board should establish clear policies about retention and dismissal, employment standards, compensation and benefits. It should not, however, insert itself into matters involving the supervision of individual employees, save for situations involving grave ethical misconduct or legal peril to the institution – and even then, a sound policy structure will usually enable senior staff to do what needs to be done without direct board involvement. It is nevertheless helpful for the chief of staff, usually the senior minister, to involve the board in hiring and termination decisions involving other senior staff positions, if only as a courtesy.

When the professional staff of a congregation grows beyond three members, choices need to be made about which members of the staff will attend board meetings on a regular basis. Just as too many cooks spoil the broth, too many staff members at board meetings tend to spoil the board's process. In fact, boards can feel overwhelmed if too many staff members are present, which will lead to poor decision-making and poor board-staff relations. In larger multi-staff congregations, it is best that the staff presence at board meetings be limited to the senior minister (or co-ministers as the case may be) and perhaps the chief administrative officer, with other staff being invited to meetings on as "as needed" basis.

When a congregation is experiencing conflict or otherwise dealing with controversial issues, it can be very tempting for both the board and staff to withhold information from one another, or at least over-manage the flow of information. It is almost always counterproductive to do so. Naturally, there will sometimes be matters that must be handled with a high degree of confidentiality or respect for privacy – personnel matters, certain financial negotiations, litigation, and the like. But far too often, boards are asked to make governance decisions in the absence of vital information that the staff possesses, while staff members seek to implement programs as the board considers changes in funding or mandates.

At no time is the temptation to withhold information more tempting than when the information contains unpleasant news. Board members should never first hear about a financial shortfall from the congregation's auditor, after it is too late to do anything about it, and staff members should never first learn of a board decision from a board member's spouse! It is also important to avoid "spin" when presenting information, whether good or bad; any commentary on the information presented should include both positive and negative implications. Boards and staff both deserve information from one another that is forthright, accurate, and concise yet complete.

Much has been written on the perils and pitfalls, frustrations and failures of religious leadership, whether we're thinking about clergy, staff, lay leaders, or the large supporting cast that constitutes the modern religious community. The real news, though, is how *well* things usually go despite the perils and shortcomings. When the relationship between a congregation's board and its staff is working well, it will look like the organizational equivalent of a dance. The parts of the system will be clearly discernible and in close proximity to one another, moving through their environment with grace, if not quite in lock-step with one another. The quality of relationship between the board of a congregation and its staff looks no more like an organizational chart than dancing looks like those dance-step templates that get laid out on the ballroom floor. Much depends on goodwill and maturity, clarity and commitment. In the end, the real life of the congregation is lived beyond the organizational chart.

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