MANAGING MICROMANAGEMENT

How to Lead the Board Out of the Weeds

Micromanagement by the board is a common frustration of executive directors, and a major contributing factor in burnout and turnover.[1] Often you will see successful and well-meaning people, who are able to delegate in their own businesses, suddenly become concerned about details such as event seating and donor envelopes. Of course, when the board focuses on minutia it is to the detriment of fundraising, planning, and governance.[2] So what causes the board to shift from governance to management? What are some effective strategies to redirect the board's energy when they are out in the weeds? How can the executive director lead the board to raise funds and govern without nagging and inadvertently decreasing board engagement?

- **First things first**. The board recruitment process should include a series of conversations which clarify expectations on both sides. If a person is not the right fit for the board they might still be a good candidate for a committee or task group. A good orientation process outlines what is expected and helps each new board member understand the difference between governance and management. The board packet reinforces this concept. Scheduling retreats and workshops led by outsiders can also help keep the board on track.
- **Recognize emotions**. Micromanagement can stem from fear of financial failure, public embarrassment, personal liability, or simply a lack of confidence in the executive director.[3] There are a number of good tools to assuage fears and guide the board back to governance.[4]
  - The strategic and annual planning processes are excellent ways to incorporate board and committee involvement. The resulting planning documents also provide metrics for the board to evaluate its own performance and that of the executive director.
  - Plan-based evaluations let the board know whether the executive director and the organization as a whole are succeeding and provide a roadmap for improvement. A failing executive director should be replaced, despite severe short-term negative consequences; normally the evaluation process will engender greater trust and provide opportunities for meaningful discussions.
  - Fear of fundraising may be a factor in micromanagement. If the board is "busy" with other tasks they can push away this more essential but often unwanted responsibility. Help the board overcome their fundraising fears by breaking down tasks, keeping things fun, and bringing in experts to them learn to succeed.
- **Carefully manage the changes that come with growth**. Micromanagement is appropriate in start-up organizations, where the board usually fulfills both management and governance responsibilities. However; even in all-volunteer groups, it is best that individual board members understand which hat they are wearing as they shift between roles. As the organization matures, staff members are hired and duties become segregated. The board composition will need to gradually change from a "hands on" board that fulfills the role of staff to a group that primarily raises funds and provides oversight. This does not mean the board is no longer a working board, the work simply changes. It can be difficult for founding

board members to transition and it is not unusual for long-serving board members to depart. It takes time for the culture of a board to adjust. Here are a few tips for guiding a board through change.[5]

- The board should develop policies that define the scope of the executive director's authority and establish evaluation processes for the executive director, the organization, and the board. These policies must be formally adopted by the board; it is helpful if a committee or task group leads discussions with the board throughout the process.[6]
- Sometimes the executive director or long-serving members of the board are no longer a good fit with the organization as it grows. Boards tend to replicate their DNA, so get board directors who are engaged and focused on the future onto the nominating committee. Often, a few new board members can help change the board culture. Honor and find meaningful new roles for board members that continue to serve.
- If members of the board resent change and become "displaced" or "rogue" directors, starting rumors or otherwise undercutting the staff leadership or the organization, they must be persuaded to resign or even fired, typically by the president. It is not the executive's job to fire a board member. If the president of the board is part of the problem, the vice president should try to work through the issues in a one-on-one conversation. Getting problem board members back in line or moving them off the board must be a board responsibility, handled in a way that is sensitive to emotions, provides a graceful exit, and is focused on outcomes.
- Before hiring a new executive director, assess the current and near-future needs of the organization, taking into consideration the organization's transition stage.
- Term limits are an excellent tool to keep the board aligned with the stage of the organization. Great board members can be invited back and often return re-energized with new ideas and a wider network of connections.

- **Tap the power of the executive director/president partnership.** The executive director and president working together are a powerful force for good, capable of slowly shifting the culture and priorities of the board. Frequent communication enables these leaders to work in tandem to induce the board to envision the direction of the organization, communicate that direction internally and externally, and inspire the board, staff and funders to work toward shared goals
- **Turn micromanagement into positive energy and address it when it occurs**. One of the best ways to redirect a micromanaging board is to assign a higher priority to appropriate work. Also, review the organization's culture, policies, and procedures to find ways to gently guide the board back to governance.
  - **Analyze the board agenda.** What is the balance of management (reports on past activities and discussion of staff responsibilities) versus governance (evaluation, strategy, and vision)? Working together to design a meeting agenda that includes

more strategic discussion is one way the dynamic duo of executive director and president can change the organization's culture.

- **Utilize committees.** Board committees are an appropriate forum for board directors to work at a detailed level to achieve strategic organizational goals. Each committee should have a commission (statement of purpose) that delineates their authority. Other board members and the executive director should let committees do their work and present recommendations to the board. Don't use board meeting time to rehash committee discussions but rather to discuss and act upon the committee's recommendations or address their questions on how to proceed.
- **Board members: speak up!** If a board discussion is getting in the weeds, the president should bring the discussion back to the governance level. If the president is not a skilled facilitator another board member, or if necessary the executive director, should politely redirect.
- **Talk about and practice governance.** Sounds easy, but it is not! Most people prefer detail-level thinking because we constantly operate at that level. Don't expect your board members or your executive director to understand governance-level thinking. Talk about the roles of the board and executive director, provide training, and strive to guide discussions toward the appropriate level.
- **Develop governance-level questions.** Going through an exercise with the executive director and board to develop questions that relate to finance, fundraising, strategic planning, programs, and evaluation can help. This is also a great exercise for board orientation.

- **Do not enable inappropriate behavior**. The board chair and executive director must work together to keep minutia off the board's agenda and politely but firmly remind the board of its governance role and the executive director's responsibility for management.

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[1] *"Micro*-Meddling *Boards Undermine* Progress." Dan Pallotta. *Harvard Business Review*, 2010. Accessed August 3, 2015. https://hbr.org/2010/12/micro-meddling-boards-undermin.html.

[2] According to a CompassPoint study, the greatest source of executive stress is not micromanagement, but a related factor: lack of board support with fundraising. *Daring to Lead 2011: A National Study of Nonprofit Executive Leadership*. CompassPoint Nonprofit Services and the Meyer Foundation. 2011. Accessed August 6, 2015. https://www.compasspoint.org/sites/default/files/docs/research/Daring%20to%20Lead%202011%20Main%20Report_062211.pdf

[3] "What Is Micromanagement and What Isn't?" Jan Masaoka. *Blue Avocado*. Accessed August 3, 2015. http://www.blueavocado.org/content/what-micromanagement-and-what-isnt.

[4] "Why Boards Micro-Manage and How to Get Them to Stop." Hildy Gottlieb. *Help4Nonprofits*.com. Accessed August 3, 2015. 2001, rev. 2007, 2009. http://www.help4nonprofits.com/NP_Bd_MicroManage_Art.htm.

[5] "Should Mature Nonprofits Allow Board Micromanagement?" Eugene Fram. *Huffington Post Blog*. Accessed August 3, 2015. http://www.huffingtonpost.com/eugene-fram/should-mature-nonprofits_b_5686060.html.

[6] "Board Micromanagement Is the Number One Executive Director Complaint." Barry Hessenius. *Barry's Blog*. 2013. Accessed August 3, 2015. http://blog.westaf.org/2013/01/board-micromanagement-is-number-one.html.

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