



Getting the Most Out of the

Executive Director & Board Partnership

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Your partner in unharnessing Vision, unifying Voice, and strengthening Vitality

How many of you have a new boss every 2–3 years?

By a show of raised hands

For those who raised your hands — how many of you enjoy having a revolving door of bosses?

The ED–Board relationship is unlike any other in the nonprofit world.

Board chairs turn over every 2–3 years on average

EDs often serve 5–10+ years under multiple board chairs

Let's Start Here

1

What are the characteristics of an ideal partnership with your Board (or ED if you are a board member)?

2

What is most important to you about this relationship?

3

What does a great working partnership actually look like day to day?

🕒 Take 2 minutes — jot your thoughts on your handout

PART ONE

The Executive Director & Board Chair Relationship

The foundation everything else is built on

A Quick Poll

How would you describe your ED / Board Chair relationship right now?

A

Working well — we're aligned and communicating effectively

B

Functional, but we could strengthen the partnership

C

Tension or role confusion — we're figuring it out

D

New relationship — still establishing how we work together

Communication: The Nuts and Bolts

From the handout: What frequency and method of communication works best for BOTH of you?



Cadence

- > Weekly check-in (common)
- > Bi-weekly for some
- > Before & after board meetings
- > Ad hoc by mutual agreement



Method

- > Phone vs. email vs. text
- > Video call vs. in-person
- > Shared documents
- > Response time expectations



Content

- > Upcoming decisions
- > Staff / board issues
- > Community intelligence
- > Strategic pulse check

No single right answer — the best system is the one you both actually use.

What Makes the Partnership Work



Mutual Trust

Confidence in each other's intentions and competence



Regular Check-ins

Not just before board meetings



Clear Communication

Agreed cadence, channels, and no surprises



Productive Conflict

Disagree in private, present a unified front



Role Clarity

Who decides what — without stepping on each other



Shared Priorities

Aligned on what matters most this year

The Priorities Conversation

From the handout — two questions worth discussing every year:

“What are the Board Chair’s priorities for the year or their term?”

Does the ED actually know this? Does the board?

“What are the Board’s top priorities for the Executive Director this year?”

Is this formalized? Or assumed?

Alignment on priorities is the foundation of a productive year.

When You Disagree: A Leading Practice

“Disagree in private. Present a unified front.”

1

Name it early

Don't let tension fester. Bring it to your 1:1.

2

Seek to understand

What's driving the other person's position?

3

Decide how you'll decide

Who has final say? What's the process?

From the handout:

How will you resolve conflicts or disagreements — have you talked about it?

PART THREE

The Board as a Whole

From the ED/Chair relationship to the full governance team

The Governance ↔ Operations Spectrum

BOARD / GOVERNANCE

- ✓ Mission, vision, and values
- ✓ Hire, support, and evaluate the ED
- ✓ Financial oversight & fiduciary duty
- ✓ Strategic direction
- ✓ Policy development
- ✓ Legal and ethical compliance
- ✓ Ambassadorship & fundraising support



STAFF / OPERATIONS

- ✓ Day-to-day program delivery
- ✓ Hiring and managing all other staff
- ✓ Implementing board-approved plans
- ✓ Financial management within policy
- ✓ Community and partner relationships
- ✓ Facility and horse care operations
- ✓ Curriculum and participant services

Leading Practices: Context Matters

What works for your organization depends on where you are.

Early / Working Board

- More hands-on board involvement in operations
- Role clarity still being established
- Job descriptions & skills matrix critical
- Chair/ED partnership may be more intense

Mid-Stage / Growing

- Moving toward governance board
- Engagement = more than just attending
- Committee structure taking shape
- Written expectations becoming essential

Mature / Sustained

- Performance assessments routine
- Governance committee guiding board health
- Board pipeline and succession planning
- Tri-modal meeting design

Know your stage — and whether your practices match it.

PART TWO

Role Clarity

The most essential ingredient — and the most overlooked

*If you don't want your board in the weeds,
don't lead them into the pasture.*

The Blurry Middle — Where Friction Lives

Some areas genuinely require shared navigation:

Board agenda setting

How do we create engaging, productive board meetings?

Fundraising asks

When does the board lead vs. support?

Major personnel decisions

When does the board need to know?

Strategic pivots

What rises to the level of board conversation?

Facility / capital decisions

Dollar threshold? Who approves what?

Media and public statements

Who speaks on behalf of the organization?

Discuss these proactively — don't wait for a crisis to find out you disagree.

Precursors to Board Engagement

Engagement doesn't just happen. These conditions make it possible:

01



Role Clarity

Board members can't engage well if they're confused about what's expected of them — or what's within bounds.

02



Understanding of Programs

It's hard to govern what you don't understand. Theory of change, impact stories, and site visits close this gap.

03



Board Culture

Is this a place where members feel safe to ask hard questions, disagree, and do meaningful work?

Clarification Activity

For each functional area, consider: is this Board, Collaborative, or Management?

KEY FUNCTIONAL AREAS	BOARD ROLES	COLLABORATIVE ROLES	MANAGEMENT ROLES
Priority Planning			
Finance			
Member Support			
Program Delivery			
Human Resources			
Organizational Policies			
Board Development			
Diversity, Equity & Inclusion			
Advocacy / Education			
Communication			

Leading Practices for Role Clarity

NOT one size fits all →



Written position description for board members

Sets expectations before they say yes — not after they're confused



Annual ED evaluation by the board

Structured, two-way, and based on agreed goals



Board chair job description

What does this role actually require? Does your chair know?



Board self-assessment

Identifies gaps, builds accountability, opens honest conversation



Orientation + mentor pairing

New board members shouldn't have to figure it out alone



Documented decision authority matrix

Who approves what — especially at different dollar amounts

The Board Chair's Role in Culture

“

Leading with Intent data shows a clear link between the Chair's facilitation skills and board effectiveness.

— BoardSource, *Leading with Intent*

1

Set expectations clearly

What does board membership look like here — say it out loud, not just in the handbook.

2

Build an environment of trust

Psychological safety allows board members to ask the questions they're afraid to ask.

3

Manage conflict productively

Build consensus and reach compromise — without steamrolling dissent.

4

Frame strategic questions

Encourage members to think at 30,000 feet, not 3 feet.

Meetings That Actually Engage

From the handout: What is the ideal partnership for planning board meeting agendas?



Materials in advance

1 week is the leading practice — gives members time to actually read them.



Strategy & policy focus

If your meetings are mostly operational reports, the board will disengage.



Real discussion time

Not just ratifying what the ED and chair already decided.



Consent agenda

Group routine approvals so you can spend time on what matters.



Executive session

Board-only time. Normalizes candid conversation and is good governance.



Social connection

Relationship investment. Boards that know each other work better together.

Putting It Into Practice

The SCAN framework — adapted for your organization:

S

STOP



Identify anything currently contributing to disengagement, role confusion, or poor communication. What do you need to stop doing?

C

CHECK



Audit where you are. What do you actually have in place? Position descriptions, self-assessments, check-in cadence?

A

ACT



Work with your team and board. Culture + Programs + Role Clarity — pick one meaningful action.

N

**NAIL
DOWN**



Accountability: who owns the follow-through? By when? Who will remind you?

Not everything at once. One meaningful action is better than a paralyzed checklist.

Your One Action

What is one action you could take that would strengthen your ED/Board partnership — or bring your board closer to your ideal?

Write it on your handout now:

My action:

By when:



Pair up and share your action with a neighbor.

You're each other's accountability partner.



Thank You

I hope our conversation has been useful — and that what you take from this fits YOUR organization, YOUR stage, and YOUR relationships.

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Your partner in unharnessing Vision, unifying Voice, and strengthening Vitality