

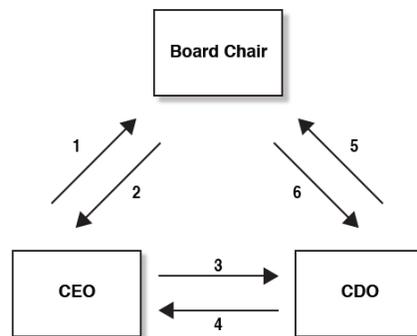
## MANAGING THE RELATIONSHIP BETWEEN THE BOARD CHAIR, THE CHIEF EXECUTIVE OFFICER AND THE CHIEF DEVELOPMENT OFFICER

*By R. Scott Rodin*

The effectiveness of most every not-for-profit organization relies on the health and quality of the relationship between the Board Chair, the Chief Executive Officer and the Chief Development Officer. Raising the funds needed to sustain and advance a not-for-profit organization is, in its best configuration, a team effort involving all three people.

In my thirty-four years of not-for-profit work as a CDO, CEO, Board Chair and consultant, I have seen some organizations flourish and others implode as a result of the success or failure of these three relationships. Among the most common failures are a lack of clear expectations by all parties, a lack of accountability to hold to those expectations, mixing roles and blurring lines of responsibility and authority, poor communication, and a lack of agreement on the fundamentals of development and a philosophy of leadership.

This brief article will address the six relational components (see diagram) found in these three relationships and offer a set of expectations that can provide a guide to increasing the quality and effectiveness of these relationships.



1. The Board Chair (and the Board) should expect that the CEO will:
  - Understand and carry out the responsibilities for fundraising according to a personal philosophy of development. The Board has a right to know (and ask for) an articulation of how the CEO understands the role of fundraising within the larger context of the overall not-for-profit organization, and within his or her own understanding of the role of the CEO.
  - Hire a CDO with a compatible philosophy. This agreement in philosophy is essential if the organization is to build a solid team for successful development work.
  - Maintain a balanced workload to include the appropriate amount of time dedicated to fundraising. This should flow out of a development philosophy.
  - Exhibit honesty and candidness with the Board in all areas, and especially with regard

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- to the development work of the not-for-profit organization.
- Build a bridge between the Board and the CDO/development staff. This is essential if the CDO is to be effective, if proper working relationships are to be established and lines of communication maintained between the development department and Board.
2. The CEO should expect that the Board Chair will:
- Build and lead a board that understands and supports the not-for-profit organization's philosophy and practice of development.
  - Hold Board members accountable for agreed upon performance in development work. Boards need decisive and intentional leadership to enable them to play their role in the success of the development plan.
  - Lead by example in giving and fundraising, and manage the Board to do the same. The Board chair sets the example for the entire organization.
  - Encourage the Board's partnership in securing major/transformational gifts.
  - Develop a Board that is teachable. Again, the Board chair sets the tone for a Board that is open to learn and grow as an effective team.
3. The CEO should expect that the Chief Development Officer will:
- Operate from a personal and professional commitment to the philosophy of development. The CDO and CEO must be thoroughly united in their perspectives on development work and its place in the not-for-profit organization.
  - Think and plan strategically. The CEO must be confident that the CDO is out ahead of everyone else in the organization in development planning.
  - Use the President and Board strategically. The CEO must have the confidence that the CDO has both the knowledge and the capability to use the CEO and Board Chair in an effective way.
  - Facilitate development education for President and Board. The CDO is an educator and trainer and the CEO must have the confidence in his/her ability to do so.
  - Be a reliable and loyal partner. The importance of loyalty to the CEO cannot be overstated. Behind closed doors there must be openness and honesty. In every other arena there must be loyalty.
4. The CDO should expect that the CEO will:
- Lead according to their personal philosophy of stewardship and development. There should be no surprises for the CDO in how the CEO lives out the commitments to development work and its place in the not-for-profit organization.
  - Advocate for the development department within broader organization and Board. The CEO must be the champion of the development department and continually advocate for its role in the organization.
  - Be willing to learn from the CDO and be used strategically in development work.
  - Trust the CDO. If the CEO is to expect loyalty from the CDO, he/she must reciprocate by trusting the CDO implicitly.

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5. The Board should expect that the CDO will:
  - Exhibit professionalism, maturity and integrity. This should be the single most vital component in this relationship. If the Board, the CDO and the CEO are all committed to the same philosophy of development work in the not-for-profit organization, then the character and ability of the CDO and the development team to carry out that work should be the most valued component in this relationship.
  - Be competent in their skills and reliable in their work. Confidence in the skills and expertise of CDO is a critical part of the Board/CDO relationship.
  - Guide the CEO, helping him or her become a more effective fundraiser. Simply put, the Board looks to the CDO to help the CEO become a better fundraiser.
  - Lead and support the Board's efforts to meet development goals. The CDO should play a significant role in helping the board set and achieve their specific development goals.
  
6. The CDO should expect that the Board will:
  - Provide the CDO with appropriate access to the Board to meet development goals. It is vital that the Board Chair communicate through the CEO to the CDO the expectations and limitations in the CDO/Board relationship.
  - Cooperate in implementing development plans. The Board chair must ensure that the Board is ready to work with the CDO in setting and meeting development goals.
  - Be willing to learn and to let the CDO train the Board.
  - Develop a culture of supporting development work and providing leadership for it within the Board.
  - Have confidence in and encourage the CDO and staff.

Finally, here are a few steps to take to help your not-for-profit organization build stronger relationships within your leadership team.

1. Agree to and communicate the expectations in all six directions. Write them down, share them widely and gain consensus and ownership of these expectations.
2. Set policy and budgets according to those expectations. They must be integrated into the systems of the not-for-profit organization.
3. Develop reporting, measurement and accountability tools to support those expectations. Know how to spot trouble early.
4. When troubles arise, revisit the expectations. Don't let strained relationships endure. You have the expectations in place. Use them to guide you out of difficulties that may arise.
5. Adjust the expectations as needed to meet the strategic goals of the organization. As strategy changes, the expectations may need to change. The expectations should be organic, yet once they are established to serve the strategic plan, they must be followed carefully, measured frequently and respected by all parties.

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Developing stronger relationships in these six areas benefits not only the not-for-profit organization, but also the donors who support it and those whom the not-for-profit organization serves. Giving partners have confidence in strong leadership teams, and organizations are more effective in carrying out their mission if these relationships are healthy and effective.

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