

No Bossy Boots Here: the relationship between the president and the manager

And that auld triangle went jingle-jangle

All along the banks of the Royal Canal

That Auld Triangle was performed in public for the first time in Brendan Behan's play, *The Quare Fellow*. Many cover versions of this famous Irish song have appeared since, including one by *The Pogues*.

Neighbourhood houses have an equilateral triangle at the heart of their operations that can go jingle-jangle too. Think of this triangle with the manager as one side, the chairperson and committee as another, and all the policies including the rules as the third and bottom side. Now think of all the other participants – users, other staff and so forth - as a group inside the triangle. That's one way to draw a picture of the neighbourhood house.

It will go jingle-jangle unless it's held in careful equilibrium by wise and skilled practitioners who've learned from their experiences.

In our session at the 2014 ANHLC state conference we looked at the relationship between the president and the manager (our terminology). We're interested in the problems that arise between these two leaders, because we've faced up to a few of them and had to find ways through.

Our sector is a complicated industry, and over the last thirty years it has created many guidelines and principles to support us in our work and our working relationships. Most houses operate in an incorporated environment. Under incorporation the committee of management or governance body is made up of volunteer members, who employ paid staff. At Venus Bay we are very aware of how much collective wisdom and experience we use. Each centre/house is able to write their own guidelines and rules as long as they hold with the unpinning principles of incorporation and the neighbourhood house sector. But the rules that govern working relationships, are often misunderstood, mismanaged or just plain missing.

At *The Centre* in Venus Bay we have a fundamental rule that we express like this:

When the committee is 'in session' they are the boss. When they are a bunch of individuals around the centre they have no power, unless the committee has delegated a task to them in writing. In between meetings the manager is the boss.

The committee can decide to do anything they like *when they are together in a formal committee meeting*. As soon as the meeting closes, the only bosses still standing are those who have a delegation to act in specified ways on behalf of the committee. At our centre the manager has the delegation to take charge of all the day to day operations of the centre, so all members of the committee including the president, report to the manager between meetings and must accept the manager's authority, until they meet together 'in session' when they can change the manager's delegation if a majority agrees.

We are lucky to have an excellent working relationship between our president and our manager and staff. But is it all luck? We have worked at, and refined, this relationship over eight years and we have reduced the incidence of conflict and damaging issues to almost zero.

In our session at the ANHLC conference, we talked about some of the situations we have faced, others that came to light during the session suggested by participants, and some of the strategies we have found helpful.

Four crucial documents

At Venus Bay, the most important documents are our *strategic plan* (3 years), our *rules*, the *role descriptions* for the committee members, including the president, and the *delegations to the manager*. These are in our 66 page policy hand book. This policy hand book guides everything we do - from day to day management, projects, committee meetings, and strategic relationships. It is the foundation of our Centre and it's clear and simple to understand. It is available to our members, staff and volunteers and we are happy to share it with our colleagues in the neighbourhood house sector. You can find it on our website at www.vbcc.org.au We're always looking to improve what we do and welcome ideas about how to improve any of our policies.

When things go wrong

All our participants sit inside the jingly-jangly triangle. They are surrounded or enclosed by: policies; the manager; and the president/committee. We think all three sides of this triangle are equal and hold equal importance. But if we were pushed we might say 'the centre is only as good as its manager.' This is because a good manager can cover for a poor president, but a good president can't cover for a poor manager.

What to do when the balance shifts and the triangle is squished out of shape? The committee is disgruntled and shakes the foundations of the triangle; the manager is unhappy, not suited for the job or just plain tired: the president is well meaning but just doesn't have the skill set to chair; the policies are unclear and no-one understands them anyway. When things like this happen, everything about the work suffers.

In the session the group identified a lot of troubling situations.

1. Confusion about the different roles of manager and president

If manager and president aren't clear about where they stand and what is expected of them, confusion reigns. In essence, *the president chairs and the manager manages*. Our experience of this is reflected in very strong documentation about the roles of each one. These job descriptions have been refined both by the individuals and in discussion with committee members. While they are clear, they are still working documents – policy development is never fixed in stone and is more like a slow moving river. Each party can negotiate changes when needed, and then ask the committee to endorse them. At each meeting, their roles are reinforced.

The delegation to the manager starts like this:

Individual committee members can't make decisions about programs or approve expenditure. They can only make such decisions when they are together 'in session.'

It's crucial that one person manages – i.e. knows about and approves - all decisions and activities between meetings. That person is the manager.

Our most recent version of these delegations (2013) starts with responsibilities taken directly from the rules. These are the committee's responsibilities that we have delegated to the manager. Then it has a section for *other duties delegated to the manager*. The manager will:

- *manage the work of paid staff and volunteers, including committee members who are paid staff and/or volunteers;*
- *make day to day decisions about the management of centre business, to ensure that the program and services are delivered, and the building and grounds are maintained in good order;*
- *expend uncommitted VBCC funds on items up to \$800 provided that they are: within the written budget plan and/or conform to other policy guidelines;; and are reported to the committee at the next meeting via financial reports.*
- *expend grant monies in accordance with the terms of the grant*

Likewise the duties of the president are taken from the rules and common practice, plus this specific statement about the president's relationship with the manager:

The president will normally chair the selection committee for the position of manager, act as a sounding board for the manager between committee meetings, and will undertake an annual performance evaluation with the manager.

For the moment this is enough. If we run into trouble we'll look at this again.

2. Poor chairing of committee meetings, bad behaviour of committee members

Everyone is busy and time poor, so each meeting should be succinct and effective.

And you need a skilled chair. If you haven't got one you need to work on it. The process might take two years but is worth every effort to fix. Skilled managers sometimes help a poor chair out, but that's not always possible, and never desirable.

A clear agenda that includes timing for each section is critical. A committee meeting is a business meeting, and the important work of the committee in policy and planning needs to be undertaken at this time. Stick to the business at hand and keep the chitty chat to a minimum. A tightly run committee meeting can cover all the work needed in the time set; we allow two hours for each meeting. We set our meeting dates for the year and generally stick to them, understanding that not

everyone will be able to attend each one; however it is critical that the manager and president (or vice president are present).

We always appoint a timekeeper and a meeting evaluator; this keeps us on track and allows feedback at the end of each meeting.

Written reports (managers' report, finance report and minutes) are always circulated the week before each meeting, the meeting is conducted on the basis that each member has read the material, so discussion can be about any issues that come to light from the reports rather than going through daily happenings.

The chair needs to keep a keen eye on straying from these guidelines; it is tempting to spend ages discussing light fittings or kitchen furniture, because these are the easy and often more interesting to practical people. We are reminded that we have delegated these decisions to the manager and should take any issues about them up with her after the meeting. The committee confines its decisions to policy and planning.

This is our standard agenda format, as used in November 2013.

<u>VBCC Committee Meeting</u>	
10am to 12 noon, Saturday 16 November 2013	
AGENDA	
1. Welcome, attendance, apologies, timekeeper, meeting evaluator	
2. Minutes. Confirm September 2013 minutes	
3. Business arising from August minutes	
4. Reports	
▪ Manager's report, detailing operational matters	
▪ Finance Report	
5. Correspondence	
• See folder	60 minutes
<u>6. Policy and Planning</u>	
• Project plan and brief: update policies in line with constitution HM	
• How can we be great? Discussion paper HM	
	45 minutes
<u>7. Any/other business</u>	
• Shuttle bus project	

8. Evaluation of this meeting – content, process, participation
15 minutes
Meeting dates for 2014
Suggested dates:

We always allow a decent and *specified* time for policy and planning at each meeting. The times vary, depending on what needs to be discussed. When there are no pressing issues, we have the opportunity to reflect on how we are going and often have a discussion paper (see *How can we be great?* on our website, which was a discussion about social enterprises).

When faced with ‘bad behaviour’ from committee members, invoking our guiding documentation has proven successful; particularly the 10 roles and responsibilities of committee members.

Over time this has worked well for us: consistently reinforcing our documentation and policies; sticking to the agenda; and focussing on the *work* of the committee during the meeting. This usually stamps out rogue ‘bossy britches’ behaviour. While we are friendly and welcoming, there are rules and guidelines and these are enacted at every level of the house and during each meeting.

It is a clear duty of the chair to be aware of and challenge inappropriate behaviour.

3. Chaired a selection committee where the wrong manager was appointed

Someone can present well at interview and then just not be up for the job. Our lesson has been to take note of referees, have a probationary period, and be on hand to guide and train a new manager. Not every chair has the time to spend each day with a new manager; it may be easy for things to get out of hand. Clear understanding of the roles can be used as a guide during the probationary period. Training may be needed in certain areas, and this should be identified as early as possible. Policies relating to employment need to be clear and followed to the letter. Regular communication between meeting between the chair and manager is critical at this time, and if necessary each side has to admit the mistake in the appointment and terminate it. You can only do this if all the documentation is clear. A strong chair is only effective when paired with an appropriate manager.

4. Manager and president want to take the house in different directions.

Simple.

It’s not for either of them to decide the direction. The work and direction of the house has to be defined by the strategic plan/annual plan. These are overall guidelines from which each operational and policy decision is made. The committee makes the final decision about what the direction will be.

The committee has to set aside time in its meetings to evaluate progress.

We have stripped our plan back to essentials. It will look like shorthand when compared to other plans. But it's a great gift to us because it lends itself to review and renewal. Why would we want to make anything harder than it needs to be?

Another way to foster a good relationship between the chair and the manager is for them to meet once or twice a year and weigh up the years' work together. This is an informal meeting where each party has the chance to discuss their strengths and areas for improvement and agree on a management path that allows for the interests and skills of each while still reflecting the plan. Remember that the plan is developed in consultation with community members, key stakeholders and committee members. This can be tweaked, however it informs the work plan for the centre in a steady and reliable way.

We have a template for reviews called *Weighing Up The Year's Work* – used by both chair and the manager. It is a format that can be adapted to committee reviews as well. See it on our website.

5. Character, competence and concepts

Most of our challenges as presidents and managers can be categorized in terms of character (mature, immature), competence (ability, skills) or concepts (policies and procedures). Discussion in the workshop identified the following problems and strategies different houses have used when tackling them.

Character

- President is too bossy, wants to run the show
- Previous Coordinator undermines/sabotages new coordinator: committee is manipulated
- Needy chair/coordinator/committee
- Power struggle between manager and chair
- Treasurer uses money as a means of control - to hold the place to ransom
- Past history/culture of poor relationships
- Manager is judgemental of committee

Personality is always a part of all relationships. To *keep your focus on the work* and set the rest aside if that's possible, is always helpful. Strategies suggested in the session were:

Practice active listening skills and other conflict resolution principles

Keep communication channels open and flowing, and stay clear about the work at hand.

Use clear documentation about roles and responsibilities to avoid misunderstanding and conflict in the workplace.

The sector is known for its burning martyr syndrome. Don't let the chair or the coordinator or anyone else whinge about being over worked. Keep them to work plans and their specified duties and hours.

The resources of the Network office can be used to facilitate some training and even dispute resolution.

The shared vision and statement of purpose as set out in the strategic plan can be used to keep the focus on the work.

Turning the negative into a positive is a skill we can all learn and we can even focus on it during committee meetings by working together on specific situations that crop up.

Clear agenda and minutes, with specific action items and motions can be used to steady things and once again focus on the work.

When treasurers use money to control others you have to tackle the problem head on, as tactfully as you can manage. At Venus Bay, and in other incorporated agencies we know about, the role of the treasurer has been cut back to budgetary, policy-type oversight. Staff are delegated to prepare and present financial reports because they do all the associated work. At least one organisation we know of, with an annual turnover of more than \$1 million, has dispensed altogether with the role of treasurer. They do have a finance committee though. We don't, because our cash flow is small.

Challenge bad behaviour. Make sure the manager - or anyone else who offends - knows that put downs are unacceptable. All of us deserve respect.

Competence

- Resistance to change (chair/ manager/committee can all be guilty of this)
- President is nice but has no idea, and no skill set for the job
- Manager is tired, been there for 20 years, doesn't recognise it's time to go
- Manager is the wrong choice, can't do the job

Competence is often easier to deal with than character. Training is the obvious strategy but having and using documented roles and responsibilities is essential.

When the manager is a poor choice or has been there too long, the best strategy is the regular review of work by the chairperson, backed up by good policy documents. In some situations a third person with special skills and experience in neighbourhood house workplaces might need to be brought in to help work through the issues.

Ideally, regular and clear communication can help identify potential problems early enough to work through them.

Following employment policy and grievance policy is always the fall back.

Concepts

- Roles are not clearly defined
- When does committee intervene to support the manager about staff?
- Whole committee resigns

- Staff complain to chair about manager
- Manager is overworked
- Different ideas about community development are in play

Good process, and knowing what it is, is the first resort of the problem solver.

Policies that explain ideas like community development help to get everyone on the same path

Having an inclusive and thorough induction of staff, committee and volunteers is critical. Everyone has to have the same information, and the same rules from which to work.

Clearly documented roles for committee members and delegations to the manager are essential when facing issues of overwork, misunderstanding and conflict.

Learning and practicing time management skills can help alleviate overwork issues. Stick to the allocated hours.

Have and use good employment policy guidelines to sort through staff and volunteer issues.

We are not alone. We can draw on Network resources, Jobs Australia and the government's free disputes resolution service to negotiate better outcomes and relationships within the neighbourhood house.

If the whole committee resigns go back to the start and look at all your policies and plans and rebuild step by step. And find a good chairperson. People won't keep coming to meetings if they are poorly run and committee members feel locked out of decision making or are denied important information to use as the basis for their decisions.

Conclusion

Our 'balance of power' at the centre in Venus Bay has taken around eight years to construct. It's hard to say if the culture is now changed for the long term and will withstand changes to the president and/or manager. Time will tell.

Reflecting on the issues with colleagues in the sector always brings us back to the third side of our triangle: easy to understand rules; delegations; clear role descriptions; and a robust strategic plan.

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 ANHLC state conference, 2014