

CREATING STRONG BOARD-STAFF PARTNERSHIPS

By Karen A. Simmons & Gary J. Stern





Established in 1994,
the Chester County Community Foundation
connects people who care
with causes that matter
so their philanthropy
makes a difference
now & forever.

The Community Foundation focuses on long-term legacy philanthropy, so that charitable assets are available to help nonprofits thrive in challenging as well as prosperous economic times. Core services include:

- Family & Individual Philanthropy
- Nonprofit Endowments & Nonprofit Capacity Building
- **Professional Advisor Outreach**, engaging estate planning attorneys, CPAs and wealth managers in legacy philanthropy



Creating Strong Board-Staff Partnerships by Karen A. Simmons & Gary J. Stern

1st edition published by the National Center for Nonprofit Boards, Washington DC, 1999

2nd edition published by the Drucker Foundation, NYC, 2002

3rd, 4th & 5th editions published by the Chester County Community Foundation, West Chester PA, 2008, 2012, 2019

Copyright NCNB 1999.

If you bring appropriate people together in constructive ways with good information, they will create authentic visions and strategies for addressing the shared concerns of the community.

David D. Creslip and Carl E. Larson, Collaborative Leadership

The complex questions surrounding what board members do, what staff members do, and how they relate to one another are among the most important and challenging issues of nonprofit governance. How do board and staff build a governance partnership that reflects:

- ♦ the unique dynamics of the organization
- the leadership capacities of the people involved
- the organization's culture, age, and maturity

In a controlled environment, without the pressure of time and the complications of human nature, it is easy to describe the ideal theory of the working relationship between board and staff:

- the board makes policy, and the staff administers it
- the board sets the course, and the staff negotiates transit

What could be clearer or simpler?

But as Harvard's Fulbright Scholar Richard Chait, Ph.D. notes in **How to Help Your Board Govern More and Manage Less,** "Governance is too complicated and too dynamic to be reduced to some inviolate division of labor."

Practically speaking, both board and staff--particularly the chief executive--get involved in both policy and administration. Most effective chief executives recommend and carry out policy objectives, and board members are expected to participate in such policy implementation activities as fundraising. In newly emerging organizations with small staffs, or in those staffed predominantly by volunteers, board members may frequently do administrative tasks.

In this complex environment, how does the partnership work? How are the passion and commitment, expertise and temperament, history and habits of board members balanced with those of the staff, particularly the chief executive? Blessed with an abundance of leaders, who in fact, is in charge? Who does what?

In the nonprofit sector, we struggle with issues that span boundaries and require many resources. Strong and productive board-staff partnerships are imperative.

1. BOARD AND STAFF IN THE CONTEXT OF ORGANIZATIONAL ISSUES

Structurally and functionally, the line between board and staff responsibility shifts over time, depending on many different factors. As an organization matures, for example, professional staff will assume responsibilities that board members performed when the organization was new. Or the balance may fluctuate according to the relative strengths and skills of board members, the chief executive, and the staff. In organizational crisis--an extreme but not unheard-of situation--board intervention in the staff realm may be required if the organization is to survive.

The generally understood board responsibilities of a nonprofit organization are to:

- determine the organization's mission and long-range goals
- select the chief executive and assess their performance in relation to the strategic plan
- ensure effective, ongoing strategic planning and monitoring of strategic objectives
- ensure sufficient development and proper allocation of resources
- determine and monitor the organization's results
- enhance the organization's public standing and key alliances
- ensure legal and ethical integrity and accountability
- recruit and orient new board members and assess board performance.

Organizational Life Cycles

In most nonprofits, these responsibilities are accomplished not solely by the board, but in partnership by the board and staff. The board does a larger share of the work in some organizations, supplemented by the staff; while the staff has a stronger role in others.

Brookings Institution board guru Karl Mathiasen explains that a key reason for these shifts in board-staff roles is the organizational life cycle. In **Board Passages: Three Key Stages in a Nonprofit Board's Life Cycle**, he describes three board models that come into play during a nonprofit's organizational life:

- an organizing board of volunteers that either follows a sole founding leader, or as a group leads and controls the organization
- ♦ a volunteer governing board
- an institutional fundraising/governing board



PASSAGES: Organizational Life Cycle Phases

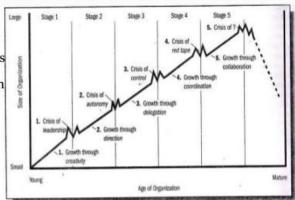
	PHASE OF CREATIVITY		PHASE OF DIRECTION		PHASE OF DELEGATION		PHASE OF CONSOLIDATION		PHASE OF COLLABORATION	
I D	One big family working for the cause; everyone pitches in	LE	Operating procedures standardized & documented	A U T O	Expand into new project areas	c	Formalized planning provides coherence and consolidation	T E A	Focus on team & collaboration	
E A	MANAGEMENT FOCUS	D				0 0 R	Org consolidation			
	Commitment to cause	E	Efficient operations		Market expansion				Nimble via teams	
	ORG STRUCTURE	5		0		D				
	Informal	H	Centralized	Y	Decentralize	A T	Team approach	CTION	Task groups	
	TOP MANAGEMENT STYLE					0	Monitor			
	Individual, entrepreneurial	Ī	Directive	Т	Delegate	74			Matrix	
	REWARDS									
	Mission, meaning		Mission, meaning		Mission, project bonuses		Mission, merit increases		Mission, merit increases	
	CONTROL SYSTEM									
	Tangible results		Standards		Profit center reports		Plan updates, dashboards		Plan updates, dashboards	
	COMMUNICATION									
	Frequent, Informal		Formal		Decentralized		Frequent, transparent		Frequent, transparent	
	BOARD ROLE									
	Following or Leading Direct Service Vol Management Vol Governance		Volunteer Governing Fundraising Governance Direct Service Vol Management Vol		Volunteer Governing Fundraising Governance Management Vol		Institutional Fundralsing Governance		Institutional Fundralsing Governance	
	># of employees increases > Informal communications inadequate > Chairisms can't keep org running > Durdened w/mgt responsibilities > Classing repending burdened w/mgt responsibilities > Classing for the good old days			are own	➤ Coordin ➤ Focus o		this/Retforms rampant nation breaks down on individual projects or ranewed sense of overall direction		> Red tape > Proliferation of planning > Accountability systems can exceed their utility	



 Larry Greiner developed a life cycle model in the 1970s.

 Greiner's model proposes that an organization passes through five serial stages and that each stage ends in a crisis; an organization must resolve the crisis to proceed to the next stage.

- The stages are
 - creativity,
 - direction,
 - delegation,
 - coordination, and
 - · collaboration.



a g e



In the first stage, the organizing following board, board members typically are friends of the founder-leader. While they provide the moral and financial support to help the visionary leader move the idea from beyond the kitchen table into a viable and healthy organization, they have a minimal role, primarily serving as cheerleaders and rubber-stampers. They meet to hear what the founder wants to say and to give some semblance of community support to this strong leader. Nonprofits that operate in this model risk violating their accountability to the public. It is easy and typical for organizing following boards to turn into fiefdoms to sustain individual visions, rather than build community visions.

The other type of first-stage board, the organizing leading board, has a healthier dynamic. Board members are strongly involved in nearly every governance function. Over time, the board is called upon to do more and more. As the demand for services grows, board members find it difficult to sustain a higher degree of hands-on direct service work along with their governance responsibilities. The need becomes apparent for staff and a balanced board-staff partnership.

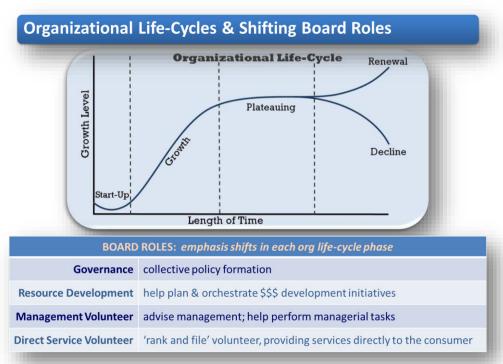


In the second stage of organizational development, the volunteer governing board emerges, with sharing of power and authority between board and staff. This is a dynamic, vital partnership that begins to reveal the true potential of the organization. The board takes a responsibility for doing its own governance work, while relying on staff for input and support. Staff feels legitimately involved in the board's work and can readily integrate its daily work within the governance parameters established and monitored by the board. And when the board needs direction or motivation, staff can take an active role to generate possible options, provide information, and build the board. Some nonprofits remain in this stage for decades; perhaps indefinitely.



Other nonprofits move on to the **third stage**, **the institutional and fundraising governing board**. The board-staff partnership is a challenge in this stage, as many governance-related functions are delegated to a strong infrastructure of senior management. The organization is complex, and the board is relatively distant from core operations. Yet if the board keeps its eye on the future and management keeps its eye on present operations, the board-staff partnership can flourish.

When we view board functions in light of organizational life cycles, the rationale for a shifting board-staff partnership becomes clear. Over time, the relationship between board and staff becomes a dance, where the partners move to and fro, creating new lines and boundaries depending on the needs of the organization.



Board Roles

The board-staff partnership can become especially entangled when board members take on multiple roles. Board members generally undertake a combination of these four roles:

- ♦ GOVERNANCE: Attend board and committee meetings to deliberate and decide overarching policies, realizing that full-board motions are required to approve policies.
- ♦ **RESOURCE DEVELOPMENT:** Compile a prioritized, diversified fundraising and financing plan, provide information on prospective funding sources, help plan and organize cultivation initiatives, serve as an ambassador, assist with fundraising meetings, assist with and support special events.
- ♦ MANAGEMENT VOLUNTEER: Serve as an advisor to management and/or undertake business projects related to their area of professional expertise.
- ♦ **DIRECT SERVICE VOLUNTEER:** Serve as a "rank and file" volunteer, providing hands-on program-related services the organization's constituents.

The governance role is the primary role of the board. The board can only govern as a group, when it holds formal discussions during board meetings, and puts forward motions for approval in order to make policy decisions. Committees and task forces keep the governing board's priority agenda items moving ahead between board meetings.



The other three roles, however, have both a **collective component** and an **individual component**. The roles are important. Yet they are secondary roles that board members are often asked to undertake because of their strong commitment to the mission of the organization and their expertise.

When board members are engaged in these other roles, they do not have their "governance hats" on. They are acting as individuals who just happen to be board members. Confusion occurs when board and staff fail to make this distinction.

GOVERNANCE

Collective component: Control and direct the formation of policy for matters including strategic planning, annual and capital budgeting, and the board's own processes.

Individual component: With the exception of individual committee assignments, there is no individual component. Governance only happens when individual board members speak with one voice on policies passed and viewpoints embraced by the full board. One board member cannot single-handedly develop or decree governance policies.

For example: While it is the board's collective responsibility to approve the organization's budget and review the audit, it is inappropriate for an individual board member to ask a staff member for special access to the organization's financial records or for a board member to direct a particular expenditure. The opinion of one board member cannot replace the collective voice of the entire board when making key decisions.

RESOURCE DEVELOPMENT

Collective component: Determine gift acceptance policies; annual, capital and endowed fundraising goals; committee responsibilities; and restrictions related to fundraising.

Individual component: Implement fundraising plans as part of board-staff-volunteer committees. Assist management in carrying out fundraising strategies such as donor rating, cultivation, and solicitation; donor research; individual prospecting; securing board contributions; and special events.

For example: The board as a whole is responsible for approving the overall annual fundraising plan. Throughout the year, individual board members, in partnership with staff, help with donor research, cultivation planning, meeting with prospective donors, and serving as ambassadors at special events.

MANAGEMENT VOLUNTEER

Collective component: Determine policies about board assistance in operational activities, especially those relating to conflicts of interest.

Individual component: Work with staff on specifically defined management issues and activities, reporting to designated staff members as individuals who just happen to be board members.

For example: As a whole, the board is responsible for setting the policies on disclosing situations of private inurement and conflict of interest. Due to their professional expertise, board members are often asked to work with other volunteers and staff to help with technical analysis, project planning and design, facility planning, and human resources advice. Some board members, as a function of their volunteer assignment, may be given authorization to obtain bids from vendors and outside consultants.

On a cautionary note, while board members may be asked to give advice on administrative and management issues, it should not be taken as a directive of the "board;" only for its instructional value.

DIRECT SERVICE VOLUNTEER

Collective component: Determine policies relating to personnel who help in direct-service projects, including board members themselves.

Individual component: Assist in direct-service projects under the direction of the volunteer coordinator or other staff, as individuals who just happen to be board members.

For example: Board members should set the organization's risk management policies, be aware of the liabilities they carry in relation to their volunteer program, and set policies for appropriate use of volunteers.



Individually, whether serving meals at a homeless shelter, planting trees, playing in the orchestra, or collecting tickets at a fundraising event, board members often play active roles in volunteering.

While board members may be perceived as having authority, outside the board room it is important that board members not "pull rank" when interacting with staff and volunteers.

Perhaps, in an ideal world, nonprofit board members might not be asked to do anything other than govern. There would be enough volunteers and staff to do the work that needed to be done, and management would have enough funds to pay for the outside expertise required. But until the nonprofit sector has ample resources, board members undoubtedly will be called on for more than governance. Board members, chief executives, staff members, and volunteers must all understand the difference between governance and the other roles, so that confusion from boundary crossing is limited and issues of power and control are kept in check.

2. KEY ELEMENTS OF SUCCESSFUL BOARD-STAFF PARTNERSHIPS

The Governance-Management Model

When people hear the word "partnership," they often assume a joint endeavor with no distinct boundaries. In the board-staff partnership, a proper division of labor is essential. Continued boundary confusion over time erodes the trust, mutual support, and good communications that are essential for any partnership to succeed.

If board and staff understand their proper roles and are committed to them, whose responsibility is it to sustain the understanding? The answer is both board and staff: they must build that continuity into the organization. It is important to acknowledge, however, that it is



management's responsibility to carry out the steps that are related to it.

The Chief Executive's Role

In researching effective organizations, Robert Herman, Ph.D. and Richard Heimovics, Ph.D. found that in successful nonprofits, the chief executive has a board-centered leadership style. The most able chief executives help strengthen their boards, growing impact and effectiveness. Six skills of a board-centered chief executive are

- showing consideration and respect toward board members
- facilitating interaction in board relationships
- initiating and maintaining a structure for board work
- providing helpful information to the board
- envisioning change and innovation with the board
- promoting board accomplishments and productivity

The chief executive has many opportunities to build a partnership between board and staff, and they are obligated to do so.

The chief executive has many opportunities to build a partnership between board and staff, and they are obligated to do so. Many new chief executives are surprised to find they must spend a good deal of their time and energy caring for and feeding their boards.

Part of the problem is that very few people understand what governance is. Because board members volunteer their services part time, their attention is diverted. It is the responsibility of the chief executive to focus the board on its own development. Often this means that the chief executive initiates and follows up on activities that will strengthen the partnership:

- 1. between the chief executive and board chair
- 2. between the chief executive and the rest of the board; and
- 3. among board members.

Many chief executives throw up their hands in frustration, asking, "How can I spend all this time on my board when I have so much else to do every day?"

But the reality is that well-functioning boards and well-functioning nonprofits go hand in hand. A strong board ensures that:

- the organization puts commitment to its mission ahead of individual self-interest,
- accountability checks and balances are in place,
- resources are garnered so that the organization can thrive, and
- the organization is well positioned and well represented in the public eye.

These are things that a chief executive, no matter how much of a Wonder Woman or Superman they are, cannot accomplish alone.



Building a Strong Partnership

We have described the shifting nature of the board-staff partnership due to organizational life cycle issues and the fact that the same pool of people sometimes fulfills governance and management functions. It helps to keep some fundamental principles in mind:

- ◆ **Trust:** Board and staff members must believe in each other, and be motivated primarily to do the best for the organization and the people it serves
- ♦ Honesty: Board and staff must be open and share information. There must be room for disagreement and dissent, and it must be safe to share bad news and problems.
- **Respect:** There must be an underlying appreciation for people's skills, perspectives, and motivations; an overall tone reflecting good-will; and attentiveness to group process and the chain of command.

Even when board and staff work together with trust, honesty, and respect, they face common challenges. They discover boundaries by crossing them, learning only after the fact that they are operating outside the limits of their responsibility. Sometimes they fail to fully understand or follow established policies and procedures. Sometimes issues come up that exacerbate the inherent tensions in the power balance between board and staff.

When board-staff relationships are strong, these challenges are surmountable. To foster strong relationships, both board and staff need clear definitions of their roles, explicit mutual expectations, and respectful ongoing communications.

Clear Definition of Roles

- ♦ Is the chief executive's job description updated? Does it provides a good sense of the magnitude and complexity of the job?
- ♦ Is the board clear on its responsibilities? Does the board regularly review and update its written job description for the full board, committees, and individual board members' responsibilities?
- ◆ Are policies reviewed and updated, to guide board and staff about grievances, channels of communication, and the chain of command?

Explicit Mutual Expectations

- Is the strategic plan regularly used by board and staff to guide decision-making and priorities?
- Are the chief executive's annual goals developed in relation to the overarching strategic plan?
- Does the board understand the organization's business model and annual budget?

Respectful, Ongoing Communications

◆ Do the quality, focus, and content of information that the board receives enable the board to ask good questions and make prudent decisions?

- ♦ Does the board overall feel there is adequate communication between board meetings?
- Does the chief executive and individual board members feel they can bring positive as well as negative topics to the board for discussion and evaluation?

When board and staff roles are well-defined, positive results follow:

- ♦ clear commitment to mission
- ♦ long-range goals with a definition of results
- management accountable to perform and demonstrate performance
- board commitment to appraising both progress and achievement

3. PRACTICAL ISSUES IN BOARD-STAFF PARTNERSHIPS

How do board and staff deal with the practical questions and dilemmas that invariably come up even in the most effective organizations?

Rooted in human nature, relationships between board and staff are not exempt from the occasional disagreement, tension, or confusion over what constitutes appropriate behavior in a particular situation. In fact, some would say that dynamic tension between board and staff is a good sign that the organization is not being lulled into complacency.



Dynamic tension between board and staff is a good sign that the organization is not being lulled into complacency.

Here are some common areas of concern. There is no clear-cut answer to any of these questions, as it invariably depends upon the size, structure, culture, and individual personality of the organization.

Should staff attend board meetings?

Book that staff are critical to the board's output. Over the years, they have found great value in having staff attend board meetings to experience the board's discussions and learn firsthand about board decisions; rather than hear summary versions after the fact. Staff can then engage in more productive dialogue with the chief executive about how to implement board policies, with a better understanding the direction and the rationale behind organizational and programmatic goals.

Staff also delivers reports to the board on their specific areas of responsibility. While it is inappropriate for staff to dominate board discussions, it is an opportunity for the chief executive to demonstrate staff expertise on critical issues.

Of course, when the board wishes to speak without staff present, the board can excuse staff from the meeting and go into Executive Session. Some boards do this at the end of every meeting, so there is an ongoing, regular time for the board as a whole to confidentially discuss staff issues with the chief executive.



What is the proper line of communication between board and staff?

Although the chief executive is the link between board and staff, it is impractical to say that board and staff should not engage in direct discussions.

An important role for staff is as expert resources for board committees, working directly with committee chairs.

Requests for other staff assistance or inquiries about staff work or responsibilities should be made through the chief executive. Any conflicts between board and staff members should be addressed through the chief executive. For instance, should a board member have a problem with the performance or abilities of a member of the staff, it is appropriate for them to take that issue to the chief executive, not to the staff member in question.

Board-staff communication becomes destructive when it is reduced to gossip or when it circumvents the authority of the chief executive. In general, when the board and staff value teamwork, loyalty to the organization, and positive interaction in the pursuit of mission, the organization will benefit.

What is the role of staff in committee work, work groups and task forces, etc.?

Committee work is where most of the board-staff interaction, detail work, and policy formulation take place.

Per John and Miriam Carver, authors of Basic Principles of Policy Governance, the job of board

committees is to advise the board on specific policy matters (rather than advise staff on their professional responsibilities).

Committee members should not stray into the realm of staff work. Framing nonprofit matters for policy governance is somewhat of an art, and both board and staff tend to need development in this area.

The chief executive, committee chairs, and staff must be especially careful that committee support work, initiatives, and deadlines are realistic in light of the organization's annual priorities and resources. Special attention must be paid to the boundary-spanning nature of committee initiatives, so that coordination can be built in when necessary. For these reasons, board and staff should keep the chief executive in the loop on committee communications.



How can staff participate in board recruitment and development?

From their day-to-day vantage point, staff members often meet volunteers, donors, and others in the community who has the potential for board service. Through the chief executive, the staff can pass their suggestions along to the nominating committee.

When new members join the board, staff can assist with orientation to their programmatic area.

If staff has a grievance with the chief executive, where do they go?

The board is responsible for hiring, appraising, and if necessary, releasing the chief executive.

The chief executive has the same responsibility with all staff.

When the board has a problem with the chief executive's performance, the board has the authority to address that problem directly. On an annual basis, a board can seek 360 degree input from staff when conducting its assessment of the chief executive.

As staff reports to the chief executive, in most circumstances, it is inappropriate for staff to approach the board with complaints about the chief executive's performance. Each organization's personnel manual should include a whistleblower policy that outlines the process for staff to bring concerns that involve safety, ethical concerns, or illegalities to the attention of the board chair.

On a cautionary note, staff must be careful not to use the board to vent their frustrations. Taking an issue to the board is serious action and the consequences could be far ranging for the entire organization, whether or not the allegations are true and actionable. Board members are likewise cautioned to be guarded and judicious when hearing complaints from the staff regarding the chief executive.

Does the board have a role in hiring, evaluating, or dismissing staff?

One clear role of the board is in hiring the chief executive, the organization's chief staff officer. Beyond that responsibility, the board carries no authority for hiring, firing, or evaluating other staff members.

Should an individual board member possess a particular expertise that would prove particularly helpful in recruiting staff, it is up to the chief executive to ask them to participate in recruitment interviews in an advisory capacity.

The board, as a function of a personnel committee, may advise the chief executive on personnel policy issues, develop guidelines, or review personnel budgets. The personnel committee also keeps the board informed about labor-related legislative issues at the national, state, and local levels.



CONCLUSION

We have had the opportunity to work with boards and chief executives from a variety of vantage points: as staff, as chief executives, as volunteers, as board members, as researchers, and as consultants.

As consultants, we have the luxury of being outsiders who come in to have thoughtful discussions with boards and chief executives about how they should structure processes and boundaries and enhance their working partnerships. Board and staff alike report that if they are mindful of their respective roles as they go about developing their plans, when they go on to implement the plans it is much easier to draw on each partner's strengths.

Proper, healthy, and strong relationships between board and staff are not something that organizations should deal with as an isolated issue.

A good way to recharge and redirect a board-staff partnership is simply to reflect and assess it:

- ◆ Take some time out during executive session at the end of board meetings to take the temperature and discuss board-staff partnership.
- ♦ Make sure the board-staff partnership is an item for discussion included in each annual board self-assessment process, as well as the chief executive assessment process.
- Reinforce board-staff roles through the architecture of the organization's annual work plan, committee plans, and staff plans, leading to clarity and accountability for board, staff, and volunteers.

It is up to everyone to make the board-staff partnership a model of health and effectiveness. The key question is always, "What are the right board-staff partnership relationships to further this organization's mission, today?"

The key question is always
"What are the right board-staff partnership
relationships to further this organization's mission,
today?"

RESOURCES

Authenticity Consulting Free Library by Carter McNamera, Ph.D. https://managementhelp.org/

Board Cafe

https://blueavocado.org/category/board-of-directors/

Board Source https://boardsource.org/

Don Kramer's Nonprofit Issues: Law You Need to Know https://www.nonprofitissues.com/

Books available at www.amazon.com

Andringa, Robert C. and Ted. W. Engstrom. **Nonprofit Board Answer Book: Practical Guidelines for Board Members and Chief Executives.** Written for seasoned as well as new nonprofit leaders, contains nuts-and-bolts information on recruiting committed and active board members, assessing board performance, ensuring board diversity, and knowing when and how to ask inactive members to step down.

Carver, John and Miriam Mayhew Carver. **Basic Principles of Policy Governance.** The Carvers distinguish ends from means and apply this concept to the role of trustee.

Chait, Richard. How to Help Your Board Govern More and Manage Less. Clarify the board's role, showing how boards work best when they focus on setting direction, policy, and strategy, leaving administration to staff.

Drucker Foundation. **Self-Assessment Tool for Nonprofit Organizations.** This workbook combines long-range planning and strategic marketing with a passion for dispersed leadership.

Fram, Eugene H. with Vicki Brown. Policy vs. Paper Clips: Selling the Corporate Model to Your Nonprofit Board. Using the corporate model as a guide, separates responsibilities between the board and the chief executive.

Herman, Robert D. and Richard D. Heimovics. **Executive Leadership in Nonprofit Organizations: New Strategies for Shaping Executive-Board Dynamics**. The discussion juxtaposes the executive's role in managing the board with taking direction from the board.

Mathiasen, Karl. **Board Passages: Three Key Stages in a Nonprofit Board's Life Cycle**. Learn predictable transitions and stages in a board's evolution that result from growth, to anticipate, recognize, and prepare for change.

Pierson, Jane and Joshua Mintz. Assessment of the Chief Executive: A Tool for Boards and Chief Executives of Nonprofit Organizations. Many nonprofit boards miss the opportunity appraisals provide to express support for the executive and strengthen performance.

Slesinger, Larry H. **Self-Assessment for Nonprofit Governing Boards.** An ideal tool to use for the board's own annual performance review.

ABOUT THE AUTHORS

Karen A. Simmons has led the Chester County Community Foundation since 2001. In her capacity as President/CEO, she connects people who care with causes that matter, so their legacies make a difference, now and forever. The Community Foundation works with families to establish endowed legacy funds, and helps focus each family's philanthropic vision, values and goals. The Community Foundation enhances understanding of community issues and undertakes nonprofit due diligence. As fiduciary agent, the Community Foundation handles the investments, finance, reporting and legal issues related to endowed legacy philanthropy.

Simmons served for 15 years at LaSalle University's Nonprofit Center in Philadelphia. As Executive Director, she oversaw and implemented training and consulting services to 3,000+ Philadelphia nonprofits in the areas of strategic planning, resource development, marketing and board development. Recognized by the *Nonprofit Times* as one of the 50 most influential leaders in the nonprofit sector, Simmons is a founding board member of the national Alliance for Nonprofit Management. Prior to joining LaSalle, Simmons held program design, resource development and marketing positions at the State University of New York Programs in the Arts, Skidmore College Dance Program, the Juilliard School, and the Saratoga Performing Arts Center.

Gary J. Stern is president of Stern Consulting International in Portland, Maine, specializing in organizational effectiveness for nonprofits. A frequent keynote speaking and trainer, Stern is the author of several books including *Marketing Workbook for Nonprofit Organizations* and *Mobilizing People for Marketing Success*. Formerly a senior consultant with the Amherst H. Wilder Foundation, Stern edited the Drucker *Self-Assessment Tool* and led the Drucker Foundation Self-Assessment Tool Training Team.

Chester County COMMUNITY FOUNDATION

MISSION

Connect people who care with causes that matter so their philanthropy makes a difference

now & forever.



Lincoln Biography Building

28 West Market Street

West Chester, PA 19382

(610) 696-8211

www.chescocf.org

info@chescocf.org

facebook.com/ChesCoCF/

