

Getting the board to work as a team.

Despite the best intentions of board members and staff, boards sometimes find they are not getting the best performance from the team.

Meetings can end up being fractious, conversations outside the boardroom can become more important than those inside and discussions can get bogged down in detail.

Common causes of team problems include members not knowing each other well enough to be open and frank, elephants in the room, overly ambitious agendas and poor chairmanship.

Ultimately, the chair is responsible for getting the best from the team and therefore raising the topic. If the chair is part of the problem, other board members have to be bold and suggest that team working should be discussed.

A board performance review can highlight the problem and possibly pinpoint the causes. Time spent talking about the team and how it can work most effectively is one of the best ways of making improvements.

Setting the right tone for these conversations is crucial to making progress. An annual away-day provides the ideal opportunity for such a discussion.

Private time

There are divided views on whether charity boards should have private time. Some boards have time without any staff present at every meeting, but others believe that board members should never meet alone.

Those in favour of private time believe the board should have a chance to ruminate on topics such as the performance of the leadership team, succession planning and the performance of the board itself. They might also consider the performance and pay of the chief executive with the full board.

Those against argue that this can damage trust between the board and management and that all matters - except the chief executive's performance - are best discussed with management present.

In my experience, boards should have private sessions. They should be scheduled in advance, held only once or twice a year and should not stray into matters that could be discussed with management.

A good model is to schedule this towards the end of a meeting - ask staff to leave first, so the board can have time with the chief executive alone. Then he or she should leave.

After the session, the chair should always have a meeting with the chief executive to ensure trusting relationships are maintained.

Dealing with a difficult trustee.

Most trustees are supportive, sensitive people who know how to work as members of a team.

However, some boards will find they have one or more trustees who are consistently difficult. They might be unwilling to listen carefully, always raising problems and seldom suggesting solutions, or be generally disinclined to behave in a collegiate way.

All board members need to recognise that they share responsibility for finding ways to deal with difficult trustees. It is seldom in the organisation's best interest to duck the issue.

Members can give respectful feedback - for example, with gentle comments during the meeting or in review sessions at the end of the meeting. Sometimes there will be an opportunity to raise the topic outside the meeting.

The chair has particular responsibility for addressing behaviour that is not conducive to team working and, if necessary, having a more formal conversation.

Ultimately, if persuasion does not work, the board might need to be bold and ask a difficult trustee to resign, so it can focus its efforts on the more important task of delivering the charity's mission.

Performance reviews.

It is widely accepted that trustees should regularly review the performance of the board - indeed, it is part of Charity Commission advice. Performance reviews can range from a brief discussion among board members to rigorous reviews of every aspect of governance, usually carried out through a questionnaire or structured interviews by an independent person.

So where should your organisation be on this spectrum? Large and high-profile charities should generally be at the more systematic end. These boards and their stakeholders need to be confident that every aspect of the board's performance is of the highest standard.

Such reviews can be time-consuming and costly, so many medium-sized and smaller charities opt for a lighter-touch approach. This could include a shorter questionnaire, conversations between the chair and individual members or a well-prepared discussion at a board meeting.

The keys to effective reviews include agreement on the approach, strong leadership from the chair (including feedback on their performance), recognition of what works well, openness about what requires attention and a plan and timetable for improvements.

The use of lead trustees.

Lead trustees are members of a board who take particular responsibility for an area of work - for example, as a treasurer. Other functions for which there might be a lead trustee include finance, fundraising, services, campaigns and human resources.

There are strongly held arguments in favour of lead trustees. Boards are more comfortable if a member with relevant experience takes on such responsibilities. And being a lead trustee enables the organisation to make better use of trustee expertise.

It can also strengthen relationships between the board and management. In some cases, the board member can be a voluntary 'coach' for the relevant senior manager.

Arguments against include the ever-present danger of lead members becoming complicit with management, finding it ever more difficult to remain independent and objective.

Lead trustees can further blur the often murky boundary between governance and management. Sometimes they are appropriate, but in other circumstances all board members should give their full attention to all areas of work and not rely on a few colleagues to shoulder that responsibility.

The committee for nominations.

The days of randomly tapping your mates on the shoulder and asking them to join a board are nearly over. Boards increasingly recognise the need to have skills grids and to recruit diverse members to meet the needs of their organisations.

Some boards have established nominations committees to oversee the process of recruitment, selection, election and sometimes the professional development of board members. So who should choose members of the nominations committee?

The problem is delicate in organisations with members or a broader electorate, who might be concerned about a small nominations committee becoming too powerful and recommending only people in their own image.

Having independent members or people representing a broader electorate can help. But if the nominations committee becomes too independent, it risks becoming disconnected from the board and recommending people who might meet all the requirements but not fit with the culture of the organisation.

So choosing members of the nominations committee can involve the committee itself, but it should be required to seek wider views.