

The Executive Director: The COO's Most Important Partner

When chief operating officers (COOs) talk about the keys to effectiveness and success in the COO position, almost without exception they emphasize building a strong relationship with the executive director (ED). For an organization to run smoothly, the ED and COO must act as a unit.

However, this isn't always easy. Often the COO and ED have different styles, different skills, and different jobs, so their perspectives may differ significantly. In addition, defining roles and dividing up responsibilities can be complicated. And the dynamics of working together can sometimes push the ED and COO toward narrowly defined and caricatured roles—like “unrealistic dreamer” and “naysayer”—that make them less satisfied with and effective in their jobs.

Since January of 2004, Bridgestar and its members have been exploring the COO role through regular gatherings of executives in the co-pilot seat of their organizations for broad discussions about their work. We have also conducted informal conversations and in-depth interviews with COOs and EDs representing a diversity of organizational growth stages, budget sizes, funding sources, geography, missions, and individual backgrounds and tenures.

The COOs and EDs we interviewed reported that—as challenging as their relationship can sometimes be—making it work is critical to their ability to do their jobs well. They said that a strong and functional relationship is one in which the ED supports the COO publicly and privately, the ED delegates real authority to the COO, the two are aligned when dealing with staff and other stakeholders, and they share trust and strong communication.

Functioning as a unit

According to Sandra Timmons, who was the COO of Girls Incorporated from 1998 to 2003, “The ED and the COO always must present a united front.” For example, Timmons said that when she had to communicate unpopular decisions to staff, it was important to thoroughly explain her decision and her reasoning to the ED ahead of time. That way, the ED could back her up on the occasions when staff members turned to the ED to try to get the decision reversed. “That [kind of situation] puts a lot of pressure on having a full, open, transparent relationship between the two top executives,” Timmons said.

David Williams, who worked at Habitat for Humanity International for more than 10 years, five of them as executive vice president and COO, agreed that COOs and EDs should try to work out any policy

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disagreements privately so the staff gets one clear message from the top. He said that the few times he and the Habitat president differed publicly, they saw the effects on the staff long after the two of them had worked things out.

While it may seem counterintuitive, many COOs said that keeping their EDs thoroughly in the loop on important decisions actually boosted their authority to operate independently in certain areas. According to Chrystal Kornegay, who as deputy director is second in command at Urban Edge, “If people think that talking to me is the same as talking to [the ED], then it makes it easier for them to take my word as the word of the organization. So I work really, really hard to make sure [the ED] knows who I talked to and what I said. . . .”

If the staff feels that the COO does not have authority to make any decisions without involving the ED, then the organization doesn’t have significantly more management capacity than it would without a COO. In fact, a 2004 Bridgespan Group study on growth in US youth-serving organizations found that both Harlem Children’s Zone and Big Sister Association of Greater Boston measured the effectiveness of their newly created COO positions in terms of the number of staff people who came to the COO for answers rather than to the ED. (The study was commissioned by the Edna McConnell Clark Foundation.)

Unity isn’t always easy

While both the COO and the ED have a clear interest in making it work, this relationship has some inherent challenges.

Some issues can arise from differences between the two roles. For example, several COOs who worked in organizations that defined the COO’s role as primarily internal and the ED’s as primarily external reported that they found it challenging to persuade their EDs to make necessary investments in internal systems and capacity. One COO cited as an important challenge, “helping [the ED] understand and appreciate the power of strong operational infrastructure and management. . . .He values and is so urgent around raising money and increasing visibility—which is why he was hired—so that gets prioritized over other things.”

Carving out the areas for which the COO has primary responsibility can be complicated, particularly with an organization’s first COO. In many cases, the creation of the COO role is a process of breaking the ED role into parts. Figuring out how to divide what had previously been one person’s responsibilities is a complex task, and many COOs told us that the EDs they worked with struggled with handing over responsibilities and needed some time to get used to the changes in their own jobs that resulted from

adding this position. This seemed to be particularly true when the ED was the founder and felt directly responsible for everything that happened in the organization.

Role definition is not necessarily straightforward even when a COO is hired into a preexisting position. Because the COO role is so varied across organizations, and because a COO's domain is potentially so broad, getting clarity about how the role is defined (e.g., what the COO's responsibilities are, what decision-making power the COO has) is absolutely critical.

In practice, defining what will be in the COO's purview, communicating that information throughout the organization, and maintaining role clarity is not a simple process. It requires significant work up front in the position scoping and hiring phases, as well as ongoing clarification and adjustment while the COO is in the role. However, doing it well can ensure a much smoother ride for the COO and the organization overall.

The COOs with whom we spoke described a few kinds of situations in which conflicts arose around role definition:

- When an ED delegated a particular area to the COO and then later intervened to contradict a decision the COO made in that area.
- When an ED who was interested in and/or troubled by an operational or programmatic issue bypassed the COO (and sometimes other levels of supervision) and took action directly with a front-line staff member.
- When an ED made a commitment on behalf of the organization without checking with the COO or others to see if the organization had the operational resources to follow through on the commitment. (One COO who later was promoted to ED, said in reference to the previous ED, "On the planning end, he was always doing things and then afterward saying, 'By the way, I did such and such.' Like starting [a new program]. It was fine, but I would have liked to have more time to plan and get staff to buy in. I find myself doing that sometimes too now.")

Such situations are almost unavoidable in a complex and fast-moving organization. However, if the trust and communication between the COO and the ED are generally strong, these occasions arise infrequently and, when they do occur, can be handled with minimal disruption to the organization.

Keeping clear of caricatures

Staying united is not easy when the relationship between the COO and the ED somehow pushes either or both into caricatures of their roles that interfere with their relationship, their overall effectiveness, and their enjoyment of their jobs. For example, the ED as visionary and the COO as implementer; or the ED as unrealistic dreamer and the COO as the conservative naysayer; or the ED as disconnected and the COO as translator, buffer, and peacemaker.

Many COOs we spoke with reported that they tended to play the role of “bad cop” in their organizations. Despite having a very strong relationship, Urban Edge’s Deputy Director Chrystal Kornegay and ED Mossik Hacobian experience this tension at times. In talking about differences in their styles of managing staff, Hacobian said, “Sometimes I wait too long to give up on people.” Kornegay responded, “I don’t think of it as giving up. I think of it as the organization’s need and the person’s capacity to meet that need today. Because in the absence of their capacity to meet that need today, the need is still there and it’s going to have to be met by somebody else, and somebody else is usually me. . . . So because he’s the way he is, I end up feeling like some jerk because he’s this lovely, wonderful person who doesn’t give up on people, and I’m the one who has to say, ‘It’s time to go.’”

Most EDs and COOs are bound to inhabit stereotypical roles in some forms at some times. But when the roles become exaggerated, or when one or the other becomes confined to this role in a way that precludes playing other roles, problems arise. Sometimes, even the mere expectation—on the part of the COO, the ED, or others—that they will occupy these roles is enough to create problems.

According to Citizen Schools COO Emily McCann, President and Chief Executive Officer (CEO) Eric Schwarz’s initial reluctance to hire a COO was partly due to “everything he had read about the inherent tensions in the relationship between the CEO and the COO. Often the COO is organized, diligent, and worried about processes and internal equity, and the CEO is the visionary, focused on results and opportunity. Eric didn’t want to bring on someone who would constantly say it was not possible to operationalize his vision. Also, he wanted to stay engaged in the critical work of organization-building.”

McCann said that the discussions they had before she took the position were important. “You have to ask the CEO how he plans to work with the COO.” Schwarz and McCann talked about these issues and arrived at a relationship that worked for them. Said McCann, “By attending to the highest-priority operational issues, I leverage his deep expertise in building both the sector and the organization. We take

care to keep each other informed and involved in our respective work, which helps both of us develop as leaders.”

Avoiding common pitfalls

The COOs and EDs we spoke with offered some advice on how to address potential challenges and prevent them from becoming impediments to effectiveness. While some bumps in the road are always to be expected in such a complex and dynamic relationship, there are things you can look for in the job search process to avoid a potentially problematic pairing, as well as approaches you can use on the job to help make the ED relationship you are in work better.

In your job search

- **Take some time for self-reflection.** Unless you know yourself, you won't know what characteristics to look for in an ED partner, a position, and an organization. The starting point is knowing what you do well, what you find challenging, and what you need to be effective. Do you have the skills and inclination to play a leadership role in programs, or is your strength managing the administrative functions that support the organization? Do you work best with a hands-on supervisor or one who doesn't intervene unless you ask? Are you someone who can provide the internal "glue" for the organization? Are you more oriented toward vision or implementation? Which of the things you are looking for in a job are must-haves, and which are negotiable? Take the time to think through these questions carefully.
- **Look for an ED with different and complementary strengths, but shared values and vision.** By bringing together different strengths, a COO and ED can together bring a package of capabilities to an organization that neither could offer alone. However, it's crucial to have some common values and principles that guide both you and the ED in your work; otherwise you may be held back by more fundamental clashes of principles. Urban Edge's Kornegay, who spoke above about the tension that sometimes arises from the differences between her management style and the ED's, said of her relationship with him, "We have a shared vision for the relationship, the organization, the leadership. We share a lot of the same personal values, but we're also very different in how we get there, so the relationship gets to benefit from him being really patient about some things and me being impatient, or him being impatient about some things and me saying wait, slow down."
- **Look for an ED who is self-aware.** This point follows directly from the previous one. An ED who knows his or her strengths and weaknesses will be more likely to hire a COO who balances those

traits. A self-aware ED will also be more likely to focus on those areas of strength, while enlisting the COO's help in the spheres where the COO is more qualified.

- **Look for an ED who has a vision for what the COO role can do for the organization and is ready to delegate responsibility.** If you come into a situation in which the ED is openly skeptical about the value of the COO role, you may be able to win him/her over in time—but you should proceed with your eyes open. The ideal situation is one in which the ED sees from the start the value that a COO can bring. Jengie Pineda Wong, director, executive search for the Bridgespan Group, advises, “During the interview process, prospective COOs need to find out: Are you and the ED in alignment on what the value of the COO role is to the organization? How open is this ED to partnering with the COO?”

One veteran COO who has partnered with a number of EDs said, “For the COO to be effective, the ED has to be willing to step back; to set a general framework and strategy and then turn to external things and let the COO run the organization internally.”

- **Find out what you can ahead of time, and if necessary, negotiate and set ground rules early.** When Melinda Tuan was interviewing for the associate director position with REDF (formerly the Roberts Enterprise Development Fund) in 1997, she did significant research on the organization and its key people. Based on what she saw as differences between her management style and that of founder and then-ED Jed Emerson, she felt strongly that staff and portfolio organizations needed one clear manager. She proposed that that role be hers, and he agreed.

Reflecting on her decision to undertake this negotiation before she had the job, Tuan said, “I saw that if I couldn't negotiate a great working relationship with him, I couldn't take the job anyway.” Janet Albert, Bridgestar's regional director of talent and recruiting, noted that this kind of negotiation can be “an early indicator of how an ED will respond to your views, and it's a way to begin to develop the trust and candor you will need to make the relationship work if you get the job.”

On the job

- **When the ED and other managers raise proposals you see as unrealistic, ask questions and share your perspective.** One longtime COO said her ED was “constantly coming up with ideas, and I have to decide when to push back. I push back on two levels. One is the resources—

who's going to do this? Two is the goals—what are we trying to accomplish with this? She expects me to help her that way and I like doing that, and it feels better than just saying, 'no.'"

- **Take some time with the ED to get to know each other and build trust.** One experienced COO said, "Trust and relationships are crucial to building a foundation between an ED and a COO. Without that, no amount of organizational structure can make it work." Real delegation of authority and a clear division of responsibilities between COO and ED requires trust that when acting independently, the COO will make choices that reflect that organization's mission, values, and strategy. If the ED doesn't feel confident that the COO knows when issues require the ED's attention, s/he may feel obliged to look over the COO's shoulder.

According to another COO, "You build the necessary trust by doing things you say you will do, doing them well, and keeping the ED in the loop while it happens. That takes time, and it's something I have to attend to every day." The COO's history with the organization and/or the ED can also contribute to building trust. Jerry Hauser, who became Teach For America's first COO after serving in both front-line and management roles, commented, "Being aligned on the culture is hugely important; the ED can't give up that piece unless she knows the COO thinks about it in same way."

In response to a question about how they have built trust between them, Chrystal Kornegay and Mossik Hacobian of Urban Edge had the following exchange:

Kornegay: We talk a lot, I guess. All those Saturdays at work.

Hacobian: It's not just the talking though.

Kornegay: We are who we say we are.

Hacobian: We deliver, we're direct. We tell each other what we think. We don't say what we think the other one wants to hear, so you know you're always getting an honest perspective. There's a lot of respect. There's caring about what we're trying to do.

Kornegay: Mossik spent a lot of time with me, so there's a level of personal investment that I didn't even think about at the time but in retrospect, it makes a difference. Our relationship is not just professional; it's also personal.

Hacobian: We regularly have dinner together with my wife. So there's a personal, social element, which isn't always there in professional relationships.

- **Clarify your role and responsibilities as much as possible.** There will almost always be some ambiguity around the division of responsibilities between the COO and ED, and COOs who are comfortable with that are likely to be more satisfied in their jobs. However, there was significant consensus among the COOs with whom we spoke that there are two key aspects to clarifying the COO role: working out the ground rules up front, and continuing to communicate and clarify roles over time.

David Williams, who was executive vice president and COO of Habitat for Humanity before becoming president and CEO of the Make-a-Wish Foundation, said, “Even though it’s hard to really get clarification on who will do what, that shouldn’t be an excuse not to sit down together at the beginning and really drill down into it. What decisions can the COO make alone, what will he decide jointly with the chief executive, and what decisions are out of his hands? Otherwise there are just too many opportunities to get in each other’s way.”

Hauser said that he and Teach For America President and Founder Wendy Kopp “worked together more in the first few months, talking situations through in order to get aligned. During that period, I would more often come to her and say, ‘Here’s what’s happening; here’s what I’m thinking of doing. What do you think?’ The key was ongoing communication—taking real examples as they were happening, talking about them, and using them to talk about the broader issues.”

- **Communicate your role and the ED’s clearly to staff and external stakeholders.** Finding an ED who is ready to delegate and establishing the necessary trust to get him/her to do that, difficult as they are, are not enough. For the delegation to be meaningful and real, it has to be communicated to staff and key partners clearly and continually.

ED Mossik Hacobian said on this issue, “I think one of the challenges that we have as we evolve this relationship is how other folks—both inside and outside of Urban Edge—view where the buck stops. If somebody thinks that if they don’t like what Chrystal says, if they think that somehow they can get a different answer from me, then they still think of me as the person to come to. But I think it’s increasingly true that people inside and outside the organization see Chrystal as the last

word on an increasing number of things over time.” Kornegay added, “...if you call for an appointment or a conversation with Mossik, and he has me call back, that sends a different message. There are some people who, you just have to say to them ‘You can go talk to him, but you’re not going to get a different answer, and you’re going to [make me angry, or make him angry.]’”

Sandra Timmons said that one ED with whom she worked as COO established their roles with staff particularly well: “From the start, she said, ‘Sandra runs the internal organization, and Sandra speaks for me.’ Whenever someone went to her with something we had defined as my responsibility, she sent them back to me.”

We have seen few if any COO-ED relationships that worked perfectly and effortlessly, and success in this area requires both a COO and an ED who are willing to communicate, be flexible, and put in the necessary work. However, if you find the right partner and both of you put in the effort, you and the ED can lead the organization as a strong, cohesive team, and this kind of leadership will have a positive impact across the organization and on those you serve.

Bridgestar (www.bridgestar.org), an initiative of the Bridgespan Group, provides a nonprofit management job board, content, and tools designed to help nonprofit organizations build strong leadership teams and individuals pursue career paths as nonprofit leaders.