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Understanding the Dynamics of Board-Executive Director Relationships in Nonprofits: A Qualitative Study of Youth-Serving Nonprofits in Utah

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Abstract: A functional positive relationship between the executive director (ED) and the board of directors (BOD) is crucial to nonprofits meeting their missions. The present qualitative study sought to identify factors—including traits, behaviors, processes, and experiences—associated with positive relationships between BODs and EDs in youth-serving nonprofits in Utah. Surveys were utilized to identify pairs (N = 6) of board chairs and EDs who had high relationship satisfaction. Individual semi-structured interviews were employed with each participant. Transcripts were analyzed using two-cycle coding, descriptive and pattern coding in which three themes emerged: (1) Background; (2) Roles; and (3) Leadership. The findings illustrated effectively harness individuals' professional experiences and skills and can provide essential support and mentoring to the ED. Furthermore, interviews with ED–Board Chair (BC) pairs revealed that holding similar values and motivations for serving and leading in the organization fed into harmonious partnership models and a supportive collaborative environment. A shared leadership approach, guided by set roles and responsibilities and solidified with trust and open communication, resulted in EDs and BCs being satisfied with their counterparts and how their organizations were operating. Findings can guide nonprofits in developing, maintaining, and evaluating relationships and processes related to leadership in nonprofits.

Keywords: board governance; nonprofit leadership; nonprofit management; nonprofit executive directors

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1. Introduction

In the U.S. alone, more than 1.8 million nonprofits with missions related to education, business and community development, human services, and recreation, among others, seek to provide essential services in communities (Independent Sector 2023). Led by a board chair, volunteer boards of directors (BODs) govern nonprofits and paid executive directors (ED) often—but do not always—manage the organization's daily operations.[1] With the board's legal responsibilities come three significant duties (Ostrower and Stone 2006; Renz 2016; Walker and Heard 2019):

- Duty of Care: Board members must use prudence and informed judgment when making decisions regarding any aspect of the organization;
- Duty of Loyalty: Board members are faithful to the organization they serve and the organization's best interest. They avoid placing personal interests or others' interests above the organization's interests;
- Duty of Obedience: Board members exhibit loyalty to the organization's mission, bylaws, and policies when making decisions for the nonprofit.

BODs' additional responsibilities generally include strategic planning, fiduciary responsibility, supporting staff and the ED, and monitoring (Renz 2016). Only the BOD as a collective can hire, evaluate, set the salary, and fire the ED (Garry 2019; Tsui et al. 2004). As

the primary steward of the BOD, the board chair is responsible for managing the board's functions and activities (Duta 2011). The board chair organizes and leads board meetings, collaboratively sets meeting agendas, and ensures that board evaluations are conducted annually (Renz 2016; Walker and Heard 2019). Additionally, the board chair facilitates the ED's evaluation process and performance review, often in conjunction with the BOD or the board's executive committee (Renz 2016).

The ED oversees the nonprofit's day-to-day management of staff and operations and keeps the board informed with timely communication (Garry 2019; Walker and Heard 2019). Generally, the ED is an "ex officio" member of the board (i.e., a member without a vote) to avoid conflict of interest (Candid 2020; Fram 2014). While the BOD is legally responsible for the organization's success, the ED is almost always held accountable for the organization's performance in reality (Duta 2011). Moreover, the ED supports the BOD to fulfill its legal obligations (Herman 2016). The ED also works with the BOD to establish formal, clear, and agreed-upon expectations and annual goals of which the ED is evaluated (Walker and Heard 2019).

A well-functioning relationship between the ED and BOD is crucial to the success and effectiveness of the nonprofit in meeting its overall goals (Bharath and Carter Kahl 2021; Duta 2011; Garry 2019; Golensky 1993; Hiland 2008; Jäger and Rehli 2012; Olinske and Hellman 2016; Walker and Heard 2019). Evidence suggests that there is a connection between BODs' involvement and ED job satisfaction (BoardSource 2021). With one in five EDs indicating BODs as a reason for poor job satisfaction (Bobowick et al. 2021), BODs should be concerned with how to best maintain healthy and productive connections with EDs while maintaining their ethical, legal, and fiduciary responsibilities to their organizations. Delineated roles and responsibilities of BODs and EDs are part of the governance structure that prevent role ambiguity (Herman et al. 1996; Mathews 2019), which can lead to power imbalances (Jäger and Rehli 2012) and conflict among BODs and EDs, negatively impacting working relationships (Duta 2011; Walker and Heard 2019). For example, when BODs are preoccupied with day-to-day management tasks, it can exacerbate low job satisfaction, leading to ED burnout and higher rates of turnover that harm organizational success (e.g., Bobowick et al. 2021; Olinske and Hellman 2016; Selden and Sowa 2015; Tsui et al. 2004). These challenges, among others, are contributing to a continued decline in interest in nonprofit leadership positions, particularly among leaders with diverse identities and backgrounds (e.g., Building Movement Project 2024).

Nonetheless, outside of the legal obligations of BODs, prescriptive one-size-fits-all governance for all nonprofits is impractical due to a variety of internal and external contextual factors (e.g., geography, society, culture, economics) and the complexity of organizations, promoting contingency leadership to sustain organizational harmony (Bradshaw 2009; Renz et al. 2023; Walters 2021). In any kind of organization, clear communication, expectations, and decision-making rules strengthen leadership and management relationships (Almaney 1974; Markey and Denison 2008; Olinske and Hellman 2016; Walker and Heard 2019). Specifically, power-sharing between the BOD and ED can enhance the effectiveness of nonprofit leadership and prevent the formation of information barriers that might negatively affect the BOD's ability to govern the organization effectively. With an equilibrium of power and support, EDs view board chairs as one of their top two "go-to" people to consult on tough decisions (Bobowick et al. 2021; Jäger and Rehli 2012; Mason and Kim 2020; Tsui et al. 2004).

Also connected to BOD–ED relationships through organizational effectiveness are board attributes, including human capital, board size, and board diversity (Jaskyte 2018). BODs that prioritize inclusion with an intentional range of human capital, such as education, professional experience, and diversity in race, age, gender, ability, and income, among other characteristics, demonstrate increased effectiveness and innovation (e.g., BoardSource 2021; Cornforth 2012; Jaskyte 2018; Ostrower and Stone 2010). Furthermore, BOD–ED congruence in thought processes, capabilities, preferences, motivations, and values contributes to effective leadership (Golensky 1993; Inglis and Cleave 2006; Jäger and Rehli 2012). Bringing

together attributes and structure, human capital must be productively employed through board systems—board culture, cohesiveness, and social capital (Jaskyte 2018; Nicholson and Kiel 2004).

Given that positive interactions and bonds between BODs and EDs strengthen nonprofits' mission effectiveness (Sherin 2008; Bharath and Carter Kahl 2021), understanding dynamics among functional strong BOD–ED relationships in specific contexts provides empirical knowledge for nonprofit leaders to apply in their organizations. Thus, the goal of the present qualitative study was to identify factors—including traits, behaviors, processes, and experiences—associated with positive relationships between BODs and EDs in youth-serving nonprofits in Utah. Few studies exist that focus on youth-serving nonprofit leadership specifically, and a qualitative investigation provides depth to inform practice in real-world settings like nonprofits (Tenny et al. 2022).

2. Results

Table 1 shows case details of each organization of the participating BC-ED pairs. The average organization age was 24.83 (range: 8 to 38) with an average of 25.26 employees (range: 6 to 71). The participating organizations were mature organizations in existence for several years with numerous employees and a paid ED. That is to say that the sample was not made up of startup organizations, led only by volunteers and minimal capacity. Table 2 provides the demographics of the individuals participating. Six executive director-board chair pairs participated in the study. The average age of EDs was 42.5 years (range: 28 to 61). Board chairs were, on average, 54.8 years old (range: 43 to 66). Board chairs ($\bar{x}$ = 1.97 years, range: 4 months to 4 years) had been in their positions less on average than EDs ($\bar{x}$ = 6.7 years, range: 5.5 months to 25 years).

Table 1. Organization case details.

Organization	A	B	C	D	E	F
Org. Age	38	8	20	26	22	35
No. of Employees	30	26	9	6	9	71
No. of Board Members	13	12	16	7	13	13
Board Charter	Yes	Yes	Yes	Yes	Yes	Yes
ED/Chair Job Descriptions	Yes	Unsure	Yes	Yes	Yes	Yes
ED Performance Review	Yes	No	Yes	Yes	Yes	Yes
Board Self-Assessment	No	No	Yes	Yes	Yes	No
ED Employment Contract	No	Yes	Yes	Yes	Yes	No
ED Paid	Yes	Yes	Yes	Yes	Yes	Yes
NTEE Code	Child Abuse, Prevention of (I72)	Child Day Care (P33)	Youth Development Programs (O50)	Youth Violence Prevention (I21)	Youth Development Programs (O50)	Family Violence Shelters (P43)

Table 1 provides organization case details provided by participant pairs in surveys. EDs reported employee counts and board chairs reported board member counts. When participant pairs responded in opposition to each other (i.e., yes/no), we reported the participant's response that was most likely to be informed (i.e., the presence of an ED employment contract is most likely to be known by the ED). When a participant was unsure or did not respond, we reported the counterpart's response. To determine whether or not the ED is paid, we referred to the organization's Form 990.

Table 2. Participant Details.

Participant	Gender Identity	Age	Profession/Vocation	Years as BC/ED
ED1	Female	31	-	4
BC1	Male	54	Database Engineering Manager	0.33
ED2	Female	61	-	0.67
BC2	Female	57	Community Volunteer	1
ED3	Female	46	-	4.5
BC3	Male	62	Retired	1.5
ED4	Female	28	-	0.46
BC4	Female	43	Physician Assistant	2.42
ED5	Male	40	-	6
BC5	Female	66	Nurse	0.08
ED6	Female	49	-	25
BC6	Female	47	Board President	4

Table 2 provides case details for each participant collected from surveys.

Figure 1 illustrates the study themes and associated codes from the inductive analysis approach influenced by social constructivism, systems theory, and strengths perspective, along with the previous nonprofit literature. Three overarching themes with accompanying codes influencing the BOD–ED relationship were identified: background, management, and roles. Background refers to a person's character traits, training and education, past professional experiences, and leadership skills. Leadership refers to how the board and ED interface, including the board's governance style, decision-making processes, communication styles, and ED autonomy. Roles pertained to how the board and ED serve and interact with their organization, including job responsibilities, accountability, expectations, goals, and level of engagement. For an in-depth description of the meaning of each theme and code, refer to the study codebook (Appendix C).

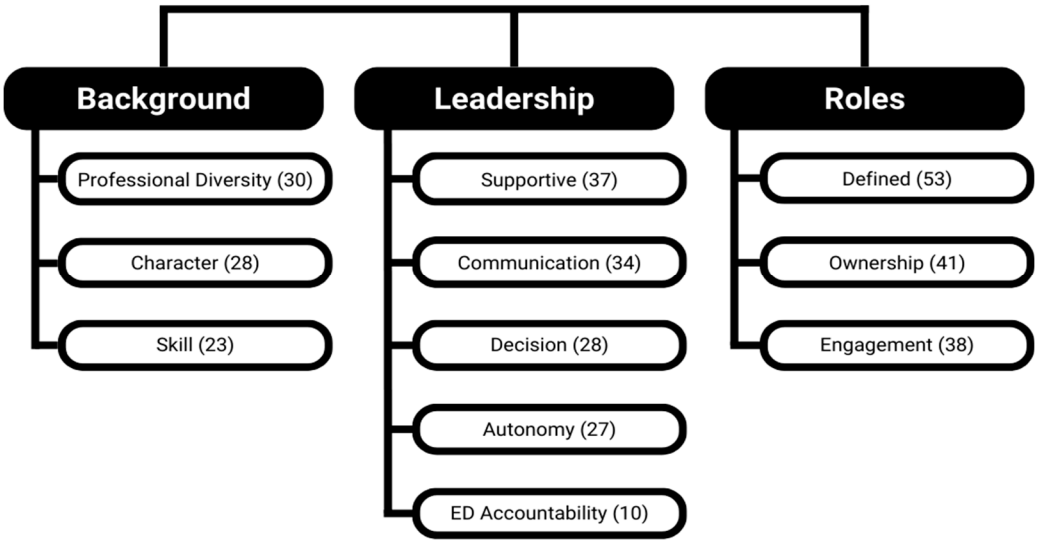

Figure 1. *Study Themes and Associated Codes.* The main three themes appear in the top boxes, and their associated codes are below with the number of times they appeared in passages in parentheses.

2.1. Theme 1: Background

2.1.1. Professional Diversity

When discussing strengths, participating board chairs and EDs almost always referenced the diverse professional backgrounds of BODs. The most commonly cited professions were related to law and finance, and some less commonly named professions included edu-

cation and information technology. These backgrounds and experiences of BODs helped members make informed decisions and provide guidance:

Organization E, Board Chair 5: We've tried to include people from lots of different walks of life [on the board]. Lots of different vocations and occupations and... experience, and I think that real-life experience is... what's been really, really helpful. [The executive director is] a relatively young executive director... even though he is, I feel like he's mature beyond his years, that the board just gives that added experience- real-life experience that he doesn't have yet, and so I think that's... been super helpful to him.

2.1.2. Character

Participants identified various personal character traits that contributed to the success of the BOD–ED relationship. These individual character traits included being caring, passionate, loving, boldness, authentic, approachable, hardworking, and motivated. Board chairs and EDs often referred to positive individual character traits influencing their high satisfaction with the board-ED relationships. For example, participants pointed out specific character traits they admired or appreciated about their board chair or ED:

> Organization A, Board Chair 1: [She] cares, she's on top of things, she's organized, she's connected.
>
> Organization D, Executive Director 4: She's very comfortable to talk to, and is very engaged with the mission. ... She's just really supportive and really wants to see the best for the organization and all of the staff.
>
> Organization F, Board Chair 6: That's one thing that I really admire about [the executive director] is just her drive to continually self-improve so that it can then be put back into [the organization].

2.1.3. Skills

Participants frequently cited the BOD's or ED's skills when discussing their satisfaction with the relationship. Valued skills for among EDs and board chairs included organization, interpersonal, communication, leadership, technical, and financial skills. Communication and organization were the skills that EDs and board chairs emphasized more than the other skills.

> Organization C, Executive Director 3: I think we have a great working relationship, because we communicate really well together. He's very engaged in the organization and ... communication wise he's just, he's very direct, very open, very honest, so we can have open honest conversations.
>
> Organization D, Board Chair 4: She's extremely organized. And she has a system, so when she is working on a particular project, whether it's our online auction fundraiser or trying to figure out how to evaluate financial transactions throughout the year she's just very organized.

2.2. Theme 2: Leadership Approach

2.2.1. Supportive

Many respondents discussed support as a defining characteristic of the BOD and the ED's relationship with the BOD. Many board chairs described their ED as integral members and supporters of the BOD.

> Organization A, Board Chair 1: She's worked very closely with me, really, I felt kind of handheld into the board. ... This is my first board experience so having somebody who wants ... wants to communicate and coordinate so closely has been a great positive experience for me.
>
> Organization B, Board Chair 2: I would not be able to run this board without her support and her engagement.

Though respondents emphasized that the ED supported the BOD's work, the more pertinent theme involved the BOD providing support for the ED. Most board chairs felt the BOD's primary responsibility was to provide support with whatever the ED needed. Many EDs also reported being satisfied or extremely satisfied with the BOD because of their support. A few participants described the governance style of the BOD as empowering. Many EDs mentioned the board chair's role in facilitating support.

> Organization B, Executive Director 2: She's also really hands-on in terms of her support. We meet every single week. She's very thoughtful in the way that she helps me to frame my thinking [and] my presentation to the board. She edits things for me. She's just a really good ally. She's a really good partner.
>
> Organization D, Executive Director 4: They're very supportive, lot of words of encouragement and concern for my well-being, which is wonderful. Yeah, they're very sweet people. I'm really happy to know them.
>
> Organization F, Executive Director 6: You essentially have seven bosses. . . . If I had to combine them all into one style. I mean, really mostly just supportive. You give us information, you tell us what you need, and we'll try and help you with the expertise that we have, or- it's more of a we're here to help and support you, how can we do that, you tell us how to do that.

2.2.2. Communication

Participants indicated that they employed various communication methods between the BOD and ED, including text, email, phone, video conferencing, meetings, and face-to-face interactions. Communication methods depended mainly on the nature of the topic. For example, email was more common when planning an event. Video calls and face-to-face interactions were more prevalent when planning the agenda for a board meeting. Participants indicated that face-to-face conversations or video conferences were more effective and beneficial.

> Organization B, Executive Director 2: I would say, the more personal the communication, the better because I just think it's extremely helpful.

Participants also indicated that clear, consistent, and frequent communication was critical. One participant discussed the importance of keeping everyone up to speed as to the status of the organization. Many board chairs and EDs mentioned that they meet and communicate weekly. A few participants emphasized the importance of maintaining an open line of communication, especially between the ED and the board chair. Five participants stressed the importance of creating a safe environment for honest and respectful communication, as follows:

> Organization D, Board Chair 4: We really promote a culture of safety and speaking your mind respectfully. You know just keeping communication open.
>
> Organization F, Executive Director 6: We both feel like we can ask hard questions about how the board's functioning and she can ask hard questions about how the organization is running and trust each other to communicate where we think things can improve on either side and how we can support each other to improve those areas.

2.2.3. Decision-Making

Considering organizational decision-making processes, nearly every board chair indicated that the BOD rarely, if ever, makes decisions that impact the organization without obtaining input from the ED. Two board chairs said that only decisions that involved a conflict of interest, such as salary, were made without the input of the ED. Likewise, three EDs said they did not make major decisions that affected the organization without input from the BOD. EDs said they were comfortable making decisions that only impacted the day-to-day operations, but generally, they still informed the BOD and kept them in the

loop. Ultimately, participants said decision-making was a shared responsibility between the ED and the BOD, but the ED's input was valued in every organizational decision.

2.2.4. Autonomy

In addition to feeling supported, many of the EDs indicated that they felt the BOD had trust in them and allowed them autonomy to run the organization daily. A few board chairs went as far as describing the BOD's management style as laissez-faire. Organization E participants described the ethos of autonomy and trust as follows:

> Organization E, Executive Director 5: I personally love the autonomy that I'm allowed as the executive director and that they really listen to what I have. . . . I love that they respect and appreciate the feedback and the ideas that I have and kind of add to that rather than imposing something. . . . That's something I think is really functional about the Board is that there's a good culture of respect and collaboration and trust, and I think that permeates through every part of the organization and it starts with them.

> Organization E, Board Chair 5: I feel like because we have so much trust in [the executive director] that we just check in but we back off. . . . we talk about what needs to be done, [then] we let him go for it and do it.

2.2.5. ED Accountability

Every organization indicated they have systems to hold the ED accountable. Participants noted that monthly board meetings generally included the ED reporting on financials, program outcomes, and other significant developments. Participants talked about how the ED's report is typically the spark for board discussion. Two EDs outlined their reporting process as follows:

> Organization F, Executive Director 6: Most of the board agenda is me reporting to the board and asking for input, and we have discussions around areas that I need recommendations in, or input in, or their help and support with.

> Organization D, Executive Director 4: Just like every month when we meet, I type up the meeting report. . . . It's like a journal basically, like here's what I did this month and what the organization does programmatically what we're doing. And they read it, and ask me questions, and then we'll move on from there. And if anything is concerning they bring it up.

2.3. Theme 3: Roles

2.3.1. Defined

With the exception of fundraising responsibilities, a general agreement among participant pairs existed regarding the roles of the ED and BODs. Ten participants communicated that the ED oversees the organization's day-to-day operations, staff supervision, public relations, reporting financials to the board, and fundraising. Many EDs also indicated that they planned board meeting agendas. Some EDs noted that they do this in conjunction with their board chair, while others said they do it alone. One ED summed up their responsibilities as follows:

> Organization F, Executive Director 6: My role is to implement and ensure the organization is following the policies, procedures, and the strategic direction that the Board and [I] formulated together. And so it's to make sure that the organization implements that plan and those policies. And to also help set the vision or direction of the organization, ensure sustainability in the organization, [and] ensure community goodwill and PR for the organization.

The participants indicated that the board's primary responsibilities included financial oversight, evaluation of the ED, setting organization policies and bylaws, and ensuring the organization meets legal requirements. Most participants also mentioned that the

BOD was primarily in charge of strategic planning and goal setting, but the ED was an integral part of the strategic planning process. An additional responsibility of the BOD that many participants shared was an advisory role in which the BOD provides guidance and mentorship to the ED:

> Organization C, Executive Director 3: So I feel like the role of the board of directors is to provide guidance to me. And also, at the same time, make sure that I'm doing my job in a satisfactory way. . . . I think having [a] . . . board of directors to then help guide and advise you is really important. I use . . . our board meetings to get ideas, to get energized, [and] to make sure . . . ideas we're running with are going in the right direction.

Fundraising responsibilities varied from organization to organization. Most organizations acknowledged it as a shared responsibility between the ED and BOD. Some participants felt that the BOD was responsible for leading fundraising efforts and part of their fiduciary responsibilities, as follows:

> Organization B, Executive Director 2: [The board has] a fiduciary responsibility, both oversight for the budget, as well as a responsibility to ensure that we have the wherewithal and finances, we need to operate

A few EDs shared that they were primarily responsible for leading fundraising efforts in their organizations, as follows:

> Organization D, Executive Director 4: I think, from what I know and have read with other boards, the other board of directors are much more engaged with fundraising and like finding new prospects. . . . There's never really been a clear expectation of who, on the board, whose job that is. You know, that's kind of like a collective job.

One board chair indicated that fundraising falls in day-to-day operations and thus is a crucial responsibility for the ED:

> Organization D, Board Chair 4: [The ED's] role is basically to manage daily operations and that can't happen without sufficient fundraising as it is being a nonprofit so. I mean she's the boss, she's the go-to lady, she basically does the schmoozing with the donors, she makes sure that they are sent notes of appreciation and kept in the loop with our financial reports and things that are happening [in the organization].

2.3.2. Ownership

Most EDs and board chairs emphasized the importance of taking ownership and accountability for the organization's success in their respective roles. However, many participants felt that the ED was primarily responsible for the organization's success, including some who said it was a shared responsibility:

> Organization F, Board Chair 6: I think that it's more her [ED] responsibility with . . . board support, so I would say something like 80% her and 20% of the board.

> Organization F Executive Director 6: If you ask the IRS it's the board. . . . If you're talking about the day-to-day delivery of services and ensuring that our programs are strong, that's ultimately my responsibility.

> Organization E, Board Chair 5: I feel like the board plays its role, and I think that there's important things that we do. . . . But I really feel like [the executive director has] got this and he really is pretty amazing. So in this organization, I would say our executive director is . . . our key player.

> Organization A, Executive Director 1: I would say me, I would take . . . that burden on myself.

Though most participants indicated that the ED was primarily responsible for the organization's success, many participants added that the board is accountable for the performance of the ED. If the ED is not performing well, it is the BOD's responsibility to step in and raise expectations or replace the ED.

> Organization A, Board Chair 1: The managing director is, is primarily responsible for the success of the organization, but the board is a safety net when things aren't going well. The board steps in, the board helps out, the board may have to hire a different executive director.

> Organization D, Executive Director 4: Accountable to the success on the day-to-day, month-to-month? Me. Accountable overall? Definitely, the board. Because if I'm not doing my job they're gonna fire me.

2.3.3. Engagement

Engagement refers to how committed and active someone is in their role. Most participants were not concerned about the commitment and activity of the ED, but many participants pointed out concerns with the commitment and participation of BODs. Many EDs and board chairs referred to the difficulty of engaging board members who were busy with other responsibilities. For example, one participant said

> Organization D, Board Chair 4: It is a volunteer board, and so we do get board members from time to time that just are really too busy to be giving the time they've committed. And they probably have a lot to offer, but aren't present either mentally or physically.

Many participants, especially EDs, spoke of the willingness of board members to serve and help and their passion for the organization's mission. However, concerns about board members' confidence in taking initiative were raised by many participants. Some EDs thought that the BOD did not take the initiative because there may be role confusion. Others pointed out that it might be because the BOD has limited knowledge of the organization due to time constraints. Many EDs said they wished their BOD was more engaged, but there were legitimate constraints on the BOD's capacity to be more engaged:

> Organization E, Executive Director 5: I would define an engaged board as they feel empowered enough by engaging with our programming and talking with me . . . to bring ideas to the table. And that they feel like they can add value to conundrums that we have or issues that we're up against and where I love and what I consider a really engaged board is that they're with it enough to know what's going on within the organization that they can add ideas. Not only ideas but then also resources or connections that help us to accomplish things in a better way or things we couldn't do before.

> Organization, F Executive Director 6: I think we have a really strong board other than . . . for an hour and a half a month, how much knowledge do you really have about what the organization needs? And that's my job to communicate that, but it is sometimes a little bit difficult.

Wishing that the BOD was more engaged and independent in taking initiative in their roles was a common desire held by most of the EDs who participated. Many board chairs shared the same sentiment but cited time restraints and lack of knowledge about the organization's needs as impediments preventing board members from engaging in the mission at a higher level. Despite these constraints, all participants felt that their BODs were passionate, even if commitment and participation were sometimes lacking.

2.3.4. Limitations

With a small sample size, participants may have been concerned about anonymity and felt pressure to respond in socially desirable ways. Selection bias may also have impacted who was able to participate. Those who were able to participate had the time, capacity, and

interest in doing so, potentially leaving out nonprofits with lower capacity. This can also be seen in the case details of participants: participating nonprofits were mature organizations, not startups as they were at least nearly a decade old with several employees. Additionally, the study was limited to Utah nonprofits serving children and youth. The relationship dynamics in nonprofits outside of the state of Utah and other kinds of nonprofits (e.g., arts, environmental, humanitarian) may vary and have other prevalent factors not captured in this study. However, given that qualitative research is meant to produce transferable and adaptable knowledge, consistency existed in the research methods to ensure value and credibility in the study's findings (Slevin and Sines 2000).

3. Methods

3.1. Worldview, Guiding Frameworks, and Design

Worldview and Guiding Frameworks. The design and execution of the present qualitative study embraced social constructivism as the guiding paradigm. Social constructivism holds that individuals assign meaning through social interaction, historical tradition, and cultural norms (Creswell and Poth 2018; DeCarlo 2018). Social constructivism was selected because the researchers were interested in understanding each participant's unique view of the BOD–ED relationship and the ways in which the social interactions between the BODs-EDs impact perspectives.

The authors are social workers by training, where systems theory and strengths perspective are two guiding theories for their discipline and influence their approach to research. By applying systems theory to the present study, the authors acknowledge, via the descriptive survey and interview guide questions, that the interrelations within and between parts of a nonprofit system and subsystems (e.g., BODs and staff) impact BOD–ED relationships (DeCarlo 2018). Thus, questions connected to organization structure, policies, processes, and dynamics were included in the measures. As an alternative to the pathology-centered approach in social work to helping clients at all levels—including mezzo-macro level systems like nonprofits, the strengths perspective focuses on strengths, abilities, talents, and resources rather than deficits (Kim and Whitehill Bolton 2013). Consequently, this study highlights nonprofits with high satisfaction levels related to their BOD–ED working relationships, prioritizing nonprofits' need for applied research to inform organization improvements, policy, and programming (Mayer and Fischer 2023).

Finally, specific to nonprofit relationship dynamics, the previous empirical and conceptual literature guided question development for the descriptive survey and interview guide. Over the past several decades, the leadership literature and scholarly research have sought to alleviate role ambiguity and provide leadership models for nonprofits (e.g., Block 1998; Carver 2006; Drucker 1990; Duta 2011; Garry 2019; Herman 2016; Ostrower and Stone 2006; Renz 2016; Tsui et al. 2004; Walker and Heard 2019). Two popular schools of thought related to the BOD–ED relationship are harmonious partnership models and hierarchical authority relationship models (Ostrower and Stone 2006). Harmonious partnership models strive for the ED and BOD as equal partners in leading the organization, acknowledging and utilizing the strengths and assets of both entities (Drucker 1990). An updated version of Drucker's harmonious model—the nucleus model—stresses fluidity and dynamic relationships between the ED, staff, board, and board chair as the critical roles of effective leadership (Duta 2011). Grounded in traditional leadership dynamics, the hierarchical authority relationship models assert either the ED or BOD with the bulk of the power and control and the other following their lead (Herman 2016; Ostrower and Stone 2006). In the U.S., 501(c)3 nonprofits' EDs answer to BODs legally, but in practice, when BODs are not fulfilling their responsibilities, EDs step up to guide strategy and finance duties along with all daily operations (Tsui et al. 2004).

Design. A qualitative collective case study design was employed in this study. A collective case study explores several cases within a bounded system or shared context. This design allows researchers to examine and compare complex phenomena across several instances rather than a single case (Orland-Barak and Hasin 2010). For the present study,

the purpose of studying nonprofits with positive relationships between the BODs and EDs—cases that share a common feature—provides an opportunity to identify patterns and variations depending on other individual and organizational factors.

Reflexivity. Reflexivity entails self-examination by researchers of their biases, beliefs, and experiences with a research topic to understand how they might impact the study design, data collection, analysis, and conclusions (Watt 2007). In the current study, the second author has a long-standing history of engagement within the nonprofit sector, both as an employee and a board member, and currently holds a position as a founder and board chair. Their intimate knowledge and insider perspective assisted in a deep understanding of the data, but navigating personal experience with objective analysis became a delicate balance. However, the first author's training in social work and political science, coupled with their newness to nonprofit management, helped identify positionality and bias.

3.2. Participants

The participants were pairs of board chairs and executive directors from nonprofits serving youth in Utah. As representatives of the Board in this study, board chairs are found to have a significant impact on the board's service expectations and overall culture (BoardSource 2021). Driving the selection of this geographic area and nonprofit type were the investigators' residency in Utah, their institution's extensive statewide network, their profession's investment in youth populations, and feasibility considerations (e.g., limited funding). Nonprofits were identified using the Utah Nonprofits Association's Nonprofit Member Directory. Contact information for executive directors and board chairs was gathered from organizations' websites. Recruitment messages to potential participants were sent via email and LinkedIn if an email was unavailable. To be included in the study, both the board chair and ED had to agree to participate.

3.3. Ethical Considerations

Written and verbal informed consent was obtained from each participant. All identifying information was removed from the interview transcripts. Organizations and participants were identified using codes (i.e., A: ED1 or A: BC1) where the letter represents the organization (i.e., Organization A) and the abbreviation represents the executive director or board chair (i.e., Executive Director 1 or Board Chair 1). Once transcribed, all interview recordings were deleted, and the deidentified transcripts were stored in secure cloud storage. Furthermore, the study was approved by the university's institutional review board.

3.4. Data Collection

Data were collected between March and July 2022. Participants first completed a survey after confirming their eligibility and agreeing to participate. The survey collected demographic information and organizational details and assessed relationship satisfaction (see Appendix A). After an organization's ED and board chair completed the survey, a 30- to 45-min semi-structured interview was scheduled with each individual separately. The principal investigator conducted, recorded, and transcribed all interviews via Zoom.

About 50 participant pairs were invited to participate in the study. Excluding unfinished responses, 18 EDs and 10 BCs completed surveys. Of all the survey respondents, eight pairs were identified, meaning eight organizations had both the ED and BC complete the survey. Interviews were not scheduled unless both the ED and BC completed the survey. Interviews were conducted with all eight EDs but only six BCs. The data from two ED interviews were not included in the study, and two BCs were not interviewed for the following reasons. Following one interview with an ED, it was determined that the organization did not meet the inclusion criteria. The other ED interview was not included because the BC never completed the interview to complete the pair. Nonetheless, the sample size is appropriate for qualitative studies because the purpose of qualitative research is to offer depth to a phenomenon that can be discovered through a few lengthy interviews (e.g., Creswell

and Clark 2004). As opposed to collecting hundreds or thousands of survey responses to ensure statistical power in quantitative studies, the equivalent in qualitative studies is data saturation, through the data collection process and analysis process, repetition of insights begins to occur, and no new insights are being revealed (Hennink and Kaiser 2022). In this study, after six pairs of interviews and initial analysis, data saturation was reached.

3.5. Measures

Though similar, the board chair and ED completed separate and role-specific semi-structured interviews and surveys. The surveys and interview guides were designed based on previous conceptual and the empirical literature on nonprofit leadership, governance, and management. Questions for both the board chair and the ED included distinguishing the differences in their roles, how they work in a team, and how they are satisfied with their working relationship. All survey and interview questions can be found in Appendices A and B.

3.6. Data Analysis

After completing all of the interviews, the principal investigator reviewed transcripts for errors and removed identifying information. Two investigators employed an inductive two-cycle coding process for data analysis (Miles et al. 2019). To develop the codebook, two researchers inductively coded five transcripts and met to reconcile codes. Then, a final codebook was developed based on the most prominent descriptive codes relevant to the research purpose and utilized language that aligned with the nonprofit literature (see Appendix C). In the first round of coding, a descriptive code was assigned to a short passage of text that summarized its overall meaning. In the second cycle, the descriptive codes were grouped into themes to pull the data together meaningfully. Survey responses were not analyzed as part of the coding cycles. Instead, survey data were used to determine inclusion and provide context for each participating organization.

4. Discussion

The present qualitative study examines the traits, behaviors, processes, and experiences associated with positive relationships between Board Chairs (BCs) of Boards of Directors (BODs) and Executive Directors (EDs) in youth-serving nonprofits in Utah. The emphasis on the dynamics of positive BOD–ED relationships offers tangible insight into characteristics and leadership practices in nonprofits—in this context, those that serve youth specifically—that point to organizational effectiveness. Interviews with EDs and BCs revealed three themes connected to positive relationships: background, leadership approach, and roles. The discussion below highlights key takeaways and potential implications for nonprofit practitioners, educators, and researchers.

4.1. Background

In this study, the background of the BODs and EDs referred to professional diversity, character, and skills. As noted by previous research, board attributes, such as human capital and size and diversity of the board, contribute to organizational effectiveness (Jaskyte 2018). Starting with what is missing from the data in this investigation about BODs and EDs, the findings do not point to the influence of diversity in race, age, gender, ability, and income on the relationships between BODs and EDs. Prior research suggests that the diversity in these attributes among BODs contributes to board effectiveness (e.g., BoardSource 2021; Buse et al. 2016; Cornforth 2012; Jaskyte 2018; Ostrower and Stone 2010). The interviews were semi-structured (i.e., somewhat guided with room for directed follow-up questions) and provided room for participants to make note of these attributes, but they did not. More targeted questions about specific personal attributes may have yielded different or additional findings. Therefore, an area for future research is the nature of working relationships among BODs and EDs when leaders are diverse in race, age, gender, ability, and income. Recent studies show that leaders of color, specifically, face different challenges

related to BODs mistaking the lack of board and organizational support for a lack of knowledge and training (e.g., Building Movement Project 2022). However, to recruit and maintain a diverse BOD that can contribute effectively, it must be acknowledged that the BOD and organization must have an inclusive culture and governance practices (Buse et al. 2016).

Aligning with previous research, the present study found that leveraging diversity in professional backgrounds, skill sets, and character traits of BODs lends well to building positive relationships and better governance with EDs, thus enhancing nonprofit operations (e.g., BoardSource 2021; Cornforth 2012; Harrison and Murray 2012; Jaskyte 2018; Ostrower and Stone 2010). While the organizations in the present study were mature (in age and size), most of the EDs were fairly new to their roles, and as one BC pointed out, a skilled and engaged BOD can provide mentorship and support for the ED, especially when they are first joining the organization (Olinske and Hellman 2016). Employing board self-assessments frequently can help nonprofit leaders identify backgrounds and skill sets on their boards and can lead to improved board performance (e.g., National Council of Nonprofits 2024; BoardSource 2021). These tools provide an opening for discussion on the strengths and gaps of backgrounds, as well as about performance generally, and many are available for free and at cost via the National Council of Nonprofits and BoardSource. However, more research is needed to determine the utility of these assessments for nonprofits that tend to be marginalized in research, including organizations that are startups, small (i.e., minimal capacity), rural, or led by leaders who are marginalized themselves.

Similarly, personal character traits—like passion, caring, and hard work—were noted as contributors to positive relationships among the participating EDs and BCs. These findings connect to previous research on the associations between shared values and motivations among nonprofit leaders and the quality of governance relationships (Golensky 1993; Inglis and Cleave 2006; Jäger and Rehli 2012). The values and motivations of potential leaders should be determined through the recruitment process to ensure they align with existing leaders and the organization's mission (Miller-Stevens and Ward 2019). The use of interviews, surveys (e.g., Inglis and Cleave 2006; Miller-Stevens and Ward 2019), and informational meetings clarify reasons that people are interested in board service. Regarding how to gauge value and motivation congruence, BODs and EDs should together take stock of organizational mission, vision, values, and needs, as well as what drives their continued engagement through intentional annual evaluation, professional development, and planning opportunities. Though there is no one-size-fits-all approach to methods, these efforts can result in improved board performance and nonprofit effectiveness (Herman and Renz 2000).

4.2. Leadership Approach and Roles

Leadership approach and roles also emerged as two prevalent themes. As with Mason and Kim (2020), the present research found that, in these positive relationships among EDs and BODs, the ED is essential to the BOD's function and success because they know the most about their organizations' inner workings. Likewise, many EDs spoke favorably of their BODS and BCs and indicated that they positively impacted their work, suggesting that the BOD's support of the ED is also vital to building a positive relationship. The participants in both roles noted that leadership of the organization is viewed as a harmonious partnership that values reciprocity as opposed to a hierarchy where, technically, the BOD is the boss of the ED. Viewing organizational leadership in this way, along with having trust in each other, also led participants to a shared decision-making model but with autonomy to the ED for daily operations, an approach highly valued by EDs (e.g., Mason and Kim 2020). In practice, the participating BODs avoided making major strategic and financial decisions without input from EDs, which is logical given that the ED is ultimately responsible for carrying out the mission even though the BOD has fiduciary responsibility (Duta 2011). Study participants had a similar understanding of their roles in the organization's operations

versus their counterpart's interpretation, consistent with previous research (e.g., Mathews 2019).

An important reason that contributes to the success of these leadership approaches and positive relationship dynamics is the existence of an open line for communication and clear, consistent, and honest communication between BODs and EDs, as found in previous studies (e.g., Golensky 1993; Mason and Kim 2020; Olinske and Hellman 2016). Though BCs and EDs communicate on a regular basis, the need for consistent attendance and reporting by EDs to BODs at board meetings is essential to building and maintaining positive relationships and trust (Duta 2011; Mason and Kim 2020). From the ED perspective, it was apparent in the present study that more engagement from the BOD would be welcomed, indicating that board members are often strained for time. To avoid role ambiguity and ensure clarity of expectations, BODs and EDs can collaboratively develop board and employee manuals (i.e., operations plans) that outline responsibilities for BODs, EDs, and others. An internal communications plan, including frequency, mechanisms, and responsibilities, could also be part of organization manuals to formally implement strategies, given the importance of communication in relationships. Once developed and implemented, these efforts should be evaluated at least annually to understand their utility and effectiveness. Again, BoardSource and the National Council of Nonprofits are valuable resources for obtaining free or affordable templates and tools. Organizations should also consider engaging with their local universities to access lower-cost experts and volunteers (e.g., Warner 2023).

5. Conclusions

Though some elements are similar to organizations in other sectors, the nature of the nonprofit world can be complex due to its reliance on volunteers and the fact that it has less capacity to accomplish stated missions compared to for-profit counterparts. The relationships between nonprofit boards of directors (BODs) and their executive directors (EDs) impact organizational well-being and their ability to meet their missions. The present qualitative study examined the dynamics between the factors that influenced BOD–ED positive relationships in mature youth-serving nonprofits. The findings illustrated that effectively harnessing individuals' professional experiences and skills can provide essential support and mentoring to the ED. Furthermore, interviews with ED–Board Chair (BC) pairs revealed that holding similar values and motivations for serving and leading in the organization fed into harmonious partnership models and a supportive collaborative environment. A shared leadership approach, guided by set roles and responsibilities and solidified with trust and open communication, resulted in EDs and BCs being satisfied with their counterparts and how their organizations were operating. Highlighting promising practices in nonprofits, specifically related to relationship dynamics in this case, can assist in improving organizational effectiveness and navigating the difficult leadership territory of nonprofits and unpaid volunteers (i.e., board members) charged with ensuring the strategic and fiscal responsibility of an organization alongside a paid executive who is responsible for day-to-day operations. Further research is critical to understanding if these same dynamics occur in other contexts (e.g., small; rural; startups) and among diverse leaders (e.g., race; gender; sexuality; income). Similarly, more empirical investigation is needed to determine the effectiveness of the methods and tools commonly recommended to develop, maintain, and evaluate effective relationships and leadership in diverse and marginally studied nonprofits.

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Appendix A. Preliminary Surveys

Preliminary Survey Questions—Board Chair

1. What is your name?
2. What gender do you identify with?
3. What is your age?
4. What is your mobile phone number?
5. What is your preferred email address?
6. What is your profession/vocation?
7. What organization are you the board chair of?
8. How long have you served as the board chair of this organization?
9. How many volunteers are active members of the board?
10. Does your organization have a board charter and/or board member agreement?
11. Does your organization have a detailed job description for the executive director and board chair?
12. Has the board conducted a formal performance review of the executive director and documented it within the last year?
13. Has the board conducted a self-assessment within the last two years?
14. Does the executive director have an employment contract in writing?
15. What is the board's overall satisfaction level concerning its working relationship with the executive director?
16. Likert scale (1 Extremely Dissatisfied; 2 Dissatisfied; 3 Neither satisfied nor dissatisfied; 4 Satisfied; 5 Extremely Satisfied)
17. What is your overall satisfaction level concerning your working relationship with the executive director?
18. Likert scale (1 Extremely Dissatisfied; 2 Dissatisfied; 3 Neither satisfied nor dissatisfied; 4 Satisfied; 5 Extremely Satisfied)

Preliminary Survey Questions—Executive Director

1. What is your name?
2. What gender do you identify with?
3. What is your age?
4. What is your mobile phone number?
5. What is your preferred email address?
6. What organization are you the executive director of?
7. How long have you been the executive director of this organization?
8. How many paid employees work for your organization?
9. Are you an ex officio or voting member of the board?
10. Does your organization have a board charter and/or board member agreement?
11. Does your organization have a detailed job description for the executive director and board chair?
12. Has the board conducted a performance review of you and documented it within the last year?
13. Has the board conducted a self-assessment within the last two years?

14. Do you have an employment contract in writing?
15. What is your overall satisfaction level concerning your working relationship with the board of directors?
16. Likert scale (1 Extremely Dissatisfied; 2 Dissatisfied; 3 Neither satisfied nor dissatisfied; 4 Satisfied; 5 Extremely Satisfied)
17. What is your overall satisfaction level concerning your working relationship with the board chair?
18. Likert scale (1 Extremely Dissatisfied; 2 Dissatisfied; 3 Neither satisfied nor dissatisfied; 4 Satisfied; 5 Extremely Satisfied)

Appendix B. Interview Guides

Interview Guide Questions—Board Chair

1. What is the role of the board of directors?
2. What is the executive director's role?
3. Who is most accountable for the success of the organization, the executive director or the board of directors? Why?
4. What do you feel are the greatest strengths the board of directors bring to your organization? The greatest weaknesses?
5. What do you feel are the greatest strengths the executive director brings to your organization? The greatest weaknesses?
6. Do you prefer to work alone or work in a team? Why?
7. If any, what are your communication preferences when it comes to collaboration with the executive director?
8. If the executive director made decisions for the organization without consulting you or the board, how would you react?
9. Describe the types of decisions the board would be comfortable making without consulting the executive director.
10. What types of decisions warrant the executive director's input or approval?
11. If the board disagrees with a decision made by the executive director, how does it handle it?
12. What kind of support does the executive provide board members in fulfilling their legal duties?
13. How crucial is the executive director to your success as a board chair? Why?
14. Describe the management style of the board of directors as it relates to the work of the executive director.
15. In the survey, you indicated that overall the board is (extremely dissatisfied, dissatisfied, neutral, satisfied, or extremely satisfied) concerning its working relationship with the executive director. Describe why the board is (extremely dissatisfied, dissatisfied, neither satisfied nor dissatisfied, satisfied, or extremely satisfied) with this relationship.
16. In the survey, you indicated that overall you are (extremely dissatisfied, dissatisfied, neutral, satisfied, or extremely satisfied) concerning your relationship with the executive director. Describe why you are (extremely dissatisfied, dissatisfied, neither satisfied nor dissatisfied, satisfied, or extremely satisfied) with this relationship.

Interview Guide Questions—Executive Director

1. What is your role as the executive director?
2. What is the role of the board of directors?
3. Who is most accountable for the success of the organization, the board or, you, the executive director? Why?
4. What do you feel are the greatest strengths you bring to your organization as an executive director? The greatest weaknesses?
5. What do you feel are the greatest strengths the board brings to your organization as a whole? The greatest weaknesses?

6. Do you prefer to work alone or work in a team? Why?
7. If any, what are your communication preferences when it comes to collaboration with the board?
8. If the board made decisions for the organization without consulting you, how would you react?
9. Describe the types of decisions you would be comfortable making without consulting the board or board chair.
10. What types of decisions warrant the board's or board chair's input or approval?
11. If you disagree with a decision made by the board, how do you handle it?
12. What is your role in planning and participating in board meetings?
13. How crucial is the board chair to your success as an executive director? Why?
14. Describe the management style of the board of directors as it relates to your work as the executive director.
15. In the survey, you indicated that overall you are (extremely dissatisfied, dissatisfied, neutral, satisfied, or extremely satisfied) concerning your working relationship with the board of directors. Describe why you are (extremely dissatisfied, dissatisfied, neither satisfied nor dissatisfied, satisfied, or extremely satisfied) with this relationship.
16. In the survey, you indicated that overall you are (extremely dissatisfied, dissatisfied, neutral, satisfied, or extremely satisfied) concerning your working relationship with the board chair. Describe why you are (extremely dissatisfied, dissatisfied, neither satisfied nor dissatisfied, satisfied, or extremely satisfied) with this relationship.

Appendix C. Code Book

Themes and Theme Definitions	Associated Codes and Code Definitions
Background: Previous experience of a board, board member, board chair, or ED	Professional Diversity: Involves the presence of individuals with diverse professional backgrounds on a board and the extent to which these backgrounds provide valuable support to executives. Character: Refers to an individual's mental and moral qualities, encompassing their ethical and personal attributes. Skill: Pertains to the practical and applicable skills an individual possesses, reflecting their competence in fulfilling their role.
Leadership: How the board and executive function with each other and lead the organization	Supportive: Concerns the board's involvement and whether it is supportive or unsupportive in regards to the work of the ED. Communication: Encompasses the style, frequency, and communication preferences between the ED and the board. Decision-making: Encompasses the processes and methods by which the board and ED make organizational decisions. Autonomy: Describes the degree of freedom granted to the ED to accomplish their work and the level of trust the board places in the ED. ED Accountability: Involves how accountable the ED is to the board, including how they take responsibility for their actions and how actively they engage in board interactions and task initiation.
Roles: What they do and attitudes about their role	Defined: Relates to the clarity of role definitions between the board and ED. Ownership: Addresses whether the individuals in their respective roles take ownership of the outcomes resulting from their efforts and whether they acknowledge responsibility for their contributions. Engagement: Reflects how committed and active individuals are in fulfilling their respective roles.

Note

[1] It is important to note that this article discusses mainstream 501(c)(3) nonprofits. Smaller, grassroots, or differently structured nonprofits may not follow this governance model.

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