



Board/Executive Staff Communications Strategies

October 10, 2012 Version

Establish Communication Priorities at the Beginning of the Relationship

Establishing rapport and communication styles early on will help throughout the board members' and executive's appointment tenure.

Ongoing Communications/No Surprises

A mutual goal in executive/board member communications is for each to keep the other informed of developments relevant to the others' roles and responsibilities. Another important goal is to avoid situations in which either elected officials or the chief executives are surprised.

Resources on Maximizing the Success of Board/Chief Executive Relations

Companion pieces to this tip sheet are available:

- Chief Executive Strategies
- Governing Board Member Strategies
- The Importance of an Annual Evaluation Process

Visit our website at:

<http://www.ca-ilg.org/Board-Chief-Executive-Relations>

Acknowledgements

This resource reflects the insights and thoughts of a number of individuals, including Kevin C. Duggan, West Coast Director, International City/County Management Association, Pete Kutras, Retired County Executive, Santa Clara, and Principal Consultant, Municipal Resource Group, LLC, Richard A. Haffey, County Executive Officer, Nevada County, and William Chiat, Director, CSAC Institute for Excellence in County Government.

In addition, the following publications are helpful on this topic:

- International City/County Management Association and National League of Cities, *Working Together: A Guide for Elected and Appointed Officials* (1999); and
- International City/County Management Association and National League of Cities, *Leading Your Community: A Guide for Local Elected Leaders* (2008).

Board Workshops

A board workshop, or series of workshops, can help to set goals and priorities for the agency. Workshops and communicating about decorum are key tools for the governing body. Such workshops enable the board to establish overall goals and priorities the community and objectives for the chief executive to pursue. Workshops can also create mutual expectations among board members on how they will work together to achieve goals.

Role of the Chair

One member of the board may be selected to serve as chair of the board. The chair may handle issues among the electeds as they arise so staff is not in the middle of any situations. An executive can work directly with the chair on agenda setting and logistical priorities.

Tailored Communications Methodologies

On a more day-to-day basis, regular communications between the chief executive and elected officials are advisable. How those communications occur will vary according to the preferences and styles of the individuals involved. Elected officials are likely to vary in how, when and where they want to engage in communication with staff. As one former elected official observed, “One size does not fit all, but all need to feel fit.”

Although the mode of communication may vary; all board members should receive the same information. The method and amount of time for delivering and receiving communication may differ among members. Understanding the communication needs of each elected official is a key executive task.

Regular In-Person Meetings

Experts suggest that one-on-one meetings between the agency chief executive and each governing body member should occur frequently-- if not weekly, then biweekly or monthly.

- Regular meetings with governing board are especially important when the body is divided.¹ If the chief executive meets only with members of the majority, the executive may undermine perceptions of staff objectivity and neutrality.
- Although staff is bound to implement the policy adopted by the majority, the relationship the chief executive develops must be with the body as a whole as well as with each individual who makes up the body.

Weekly Updates

Some agencies find a weekly newsletter/email from the chief executive to governing body is helpful practice.

- These should be informational only—not an effort to achieve consensus among decision-makers outside open and publicized meetings.²
- Executives and governing board members also need to be aware that such communications are public documents subject to disclosure to the media or in litigation.

Voice-to-Voice for Sensitive Matters

Communications relating to confidential or sensitive matters are best accomplished in person or by telephone.

Newly Elected Official Orientations

A helpful practice is for each newly-elected governing board member and the chief executive to meet individually early on. The meeting can include a tour of agency facilities and a briefing on key issues, as well as a preview of issues to be covered in any additional orientation sessions planned. It also offers elected officials the opportunity to get their most pressing questions answered.³

Staff Reports

Another form of communication between staff and elected officials (and others) are the staff reports the governing body receives in preparation for meetings. Good communication between the governing board and staff about the board's needs and expectations is important. As a general matter, the following are recognized as good practices.⁴

- **Complete Staff Work.** Staff reports should contain all of the information necessary to make an informed decision. This includes options and alternatives when appropriate, as well as anticipating questions and concerns.
- **Usability.** Complete information is useful only if it is in useable form. Executive summaries, graphics, tables and decision-trees are ways to summarize complex information in an easier-to-understand manner.

- **Plain Language.** Acronyms, jargon and technical language should be avoided. Any term that is likely to be unfamiliar to the average resident should be either defined or avoided in favor of more easily understandable wording. Be succinct and prepare executive summaries for the members as often as possible.
- **Analytic Framework.** Agency staff should use a consistent framework for presenting policy analyses. Typical components include: problem definition, options and alternatives, evaluation of options, staff recommendation, implementation and evaluation.

Subjects of Communication

Board / Executive communications should include not only what is happening or needs to happen, but how decision-making processes occur. This can be especially important on major or potentially contentious issues. The governing body may feel it needs additional time to evaluate the difficult issues presented or engage in additional public engagement processes to hear and consider public input.

Suggestions Welcome

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The Institute welcomes feedback on this resource:

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References and Resources

¹ Julia Novak and John Nalbandian, Preparing Councils for Their Work, *PM Magazine* (August 2009) available at <http://webapps.icma.org/pm/9107/public/feature3.cfm?author=Julia%20Novak%20and%20John%20Nalbandian&title=Preparing%20Councils%20for%20Their%20Work&subtitle>

² See *Wolfe v. City of Fremont*, 144 Cal. App. 4th 533 (2006); Cal. Gov't Code § 54952.2(b):

(b) (1) A majority of the members of a legislative body shall not, outside a meeting authorized by this chapter, use a series of communications of any kind, directly or *through intermediaries*, to discuss, deliberate, or take action on any item of business that is within the subject matter jurisdiction of the legislative body.

(2) Paragraph (1) shall not be construed as preventing an employee or official of a local agency, from engaging in *separate* conversations or communications outside of a meeting authorized by this chapter with members of a legislative body in order to answer questions or provide information regarding a matter that is within the subject matter jurisdiction of the local agency, if that person does not communicate to members of the legislative body the comments or position of any other member or members of the legislative body.

See also *Open and Public IV: A User's Guide to the Ralph M. Brown Act* (2010) at 17 (noting that chief executive officer briefings can be a violation of the state's open meeting laws when the process reveals information about governing body members' respective views).

³ From Mike Conduff, Council Relations, *PM Magazine* (June 2012), available at <http://webapps.icma.org/pm/9405/public/council.cfm?author=&title=Council%20Relations&subtitle>

⁴ International City/County Management Association, *Partnerships in Local Governance: Effective Council-Manager Relations* (1989) at 42-45 (chapter by Kevin C. Duggan and Terry Ellis "Preparing Staff to Work with the Council").