

Who Does What?

Executive and Staff Relationships

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Introduction

The Executive Committee of a labour union is the authority designated to carry out the will of the members. In the last analysis, what the Executive Committee says goes. If the staff can't agree to implement Executive Committee policy, it's the staff that has to resign.

The Executive Committee has to provide purpose, leadership and overall strategy, and it has the responsibility of assuring members that the organization's finances are sound, its operations are legal, and its procedures work to further members' rights.

On the other hand, it's generally the staff that has a deep understanding of the day-to-day working of the association. They are aware of the needs and opinions of the whole membership, they know what kinds of initiatives have worked before, they feel the heat when there are staffing pressures and they are on the front line when the photocopier is too old to carry on for another day.

Governance and Management

What the Executive Committee does is known as governance; what the staff does is management. The functions are separate and different but they should operate as a partnership. If there is any confusion in an organization about roles and responsibilities, it can lead very quickly to conflict, inefficiency, low morale and irritation. This happens surprisingly often.

Management has to be done by a manager, and no Executive Committee member is likely to have the time, the skills or the day-to-day know-how to be able to out-perform the staff. Similarly, Executive Committees are elected by members to provide expertise and political guidance. Staff members are usually far too close to the organization to provide the clear-headed objectivity required for a governance role. In addition, as staff are not elected, the membership has no way to express its disapproval with their political choices should disagreement arise. For that reason, it is important to maintain clear lines between setting the political direction and managing the daily business of the union.

The Partnership

Many organizations will have an Executive Director (ED) in charge of management and the Executive Committee has a President/Chair. As these two roles mirror each other it is vital that the individuals in question are able to maintain a good working relationship.

Similarly, the Executive Committee as a whole and the organization's staff must strive to achieve an amicable and productive relationship – with both parties committed to working for the good of the membership.

Clarifying Roles

The following lists may be useful in helping Executive Committee members clarify where their responsibilities begin and end.

Executive Committee Responsibilities:

- Setting long-term goals and priorities
- Having the final say when determining yearly objectives
- Ensuring the mission of the organization is adhered to
- Finalizing budgets and allocating funds
- Approving any changes or additions outside the budget
- Taking responsibility for the union's financial records
- Evaluating services and processes
- Evaluating committee members and their performance
- Employing the organization's ED, setting his/her compensation package and evaluating his/her performance
- Appointing new sub-committee members
- Evaluating the Executive Committee's performance vis-à-vis long and short term goals
- Taking ultimate responsibility for all legal matters
- Taking ultimate responsibility for compliance with regulatory requirements (e.g. annual general meeting, annual returns, audit)
- Appointing auditors and approving the audit of the financial records
- Managing committees
- Maintaining and building the union's reputation with members and the wider community

Staff Responsibilities:

- Providing information and expert advice to committees, including recommendations for action
- Supporting the Executive Committee's planning function
- Determining member needs
- Delivering services and reporting on their successes and shortcomings
- Evaluating association performance
- Organizing events approved by the Executive Committee
- Implementing Executive Committee decisions
- Conducting day-to-day financial operations
- Monitoring and managing daily operations
- Supporting sub-committee volunteers
- Providing continuity in the operations of the association

Joint Responsibilities:

- Discussing ideas and forming short and long-term goals
- Planning organizational strategies
- Designing operational processes to achieve the union's mission
- Proposing mobilizing ideas
- Ensuring that achievements are recognized and documented
- Promoting the organization

When Things Aren't Working

A successful relationship between Executive Committee members and staff comes from:

1. Suitable processes and procedures;
2. Clearly defined roles;
3. Defined boundaries which mean clear limits to the authority of the staff and clear limits on the ability of the Executive to micro-manage day-to-day office functioning;
4. An ED whose performance is adequately monitored by the Executive Committee.

Some friction is normal. The staff will always gripe about some of the things the Executive Committee does or says, and the Executive Committee will always feel that there are things that they would do differently if they were running things. In moderation, this is neither unusual nor undesirable. Regular managed discussions on issues with representation from both sides can be very productive for an organization. However, if these don't resolve problems, some further steps will obviously need to be taken.

Some of the issues to think about to avoid or resolve conflict between staff and Executive (or other) Committee members are:

- 1. Is there a clear vision and sense of purpose in the organization? If not, it should not be surprising if different parties start to pull in opposite directions.**
 - Are the association's goals and values clearly stated in its mission? Or, does the committee have clear terms of reference that everyone is aware of? Is everyone aware of the legal framework within which the association must function?
 - Is there a long-term strategy to achieve the association's or committee's purposes?
 - Has the Executive Committee signed off on it and ensured that it is clearly communicated to the ED and staff?
- 2. If you think your goals are clear and that everybody knows what they are and agrees with them, then the problem lies in the implementation of your strategies. Check your processes, procedures, your materials and your management structures.**
 - What are the links between the staff, the ED and the Executive Committee? Are there regular systems to have frequent and full reports presented at Executive Committee meetings, or do Executive Committee members feel inadequately briefed on activities while the staff feels resentful about the increased workload involved in reporting?
 - Is there a staff representative on the Executive Committee? Is the ED a member, or at least permitted to attend the meetings?
 - Does the Executive Committee allow the staff to do their jobs? Staff members should be able to use their expertise and experience to carry out Executive Committee decisions, without having to keep dashing back to the Executive Committee to change minor points.
 - How are staff instructed and by whom? Is direction given clearly and in a timely manner to enable staff to prioritize and accomplish Executive goals? Are there multiple lines of supervision whereby many people assign work to staff? What processes facilitate the coordination of this work? Are committee members aware of staff job descriptions, capabilities and workloads? In the absence of clear processes around supervising staff, tensions often emerge over workload, job responsibilities and completion of tasks in a timely manner.
 - As elected members of the union, the Executive Committee is expected to act at all times as representatives of the union (not their departments or themselves). That

means their interactions on campus can have ramifications for the work of the union. Are Executive members acting accordingly and reporting back on meetings and conversations that impact the union to staff? Are they consulting on current union policy before speaking out?

- As employees, staff members are expected to represent the interests and political will of the members in their dealings with the employer. These interactions have implications for the work of the union. Are staff acting appropriately and reporting back on meetings and conversations that impact the union to the Executive? Are they consulting before making decisions about novel, complex or ambiguous situations?
- Do Executive Committee members know, understand and support the division of responsibility? If Executive Committee members put up motions that wander too far into operational territory, the Chair should steer them back. If this happens often, the Executive Committee may have to set aside a session to go through its proper roles and functions until all members are clear.
- Do staff members know, understand and support the division of responsibility? The Executive Committee must authorize all important policies and all important changes in policy. These decisions, and the reasons for them, must be documented and made available to the staff. While recommendations for action may be made by staff, they should not run the show; this means that the Executive Committee should be given options where there are options, not simply presented with a single decision to sign off on.

Effective functioning requires the commitment and perspectives of both the staff and the Executive Committee. A productive partnership will smooth the path to clear and solidly grounded decisions that everybody can support.