

# Being a Trustee

## . . . the trustee as servant

In his essay, *Trustees as Servants*, Robert Greenleaf outlined his concept of the role of trustees: **to stand outside the active program of the institution and to manage, delegating to a director administrative responsibilities.** He makes the following distinctions between *management* and *administration*.

**1. Trusteeship** is the holding of a charter of public trust *for* an institution. Trustees are legally and ultimately responsible for the institution and everything that goes on in it. Trustees are members and representatives of the general public whose trust they hold. As trustees they make *trustee judgments*, not administrative or professional judgments.

**2. Management.** The bylaws of the institution should specify the actions which trustees themselves must take and those which they delegate to the staff. The major trustee functions in institution management are:

- a. **To set the mission and goals of the institution and to approve plans for reaching the goals.** Staff members should be listened to carefully. But goals are trustee formulated, not just trustee approved or affirmed.
- b. **To appoint the director, to design the administrative structure and approves the job descriptions of individuals working with the director, and to act so as to motivate administrators and the staff.** Trustees do not rubber stamp administrative recommendations.
- c. **To assess, at appropriate times, the performance of the institution,** its major parts, and the work of its director in the pursuit of the established goals.
- d. **To take appropriate action** based on what is found in the above assessment.

**3. Administration** is a function designed by trustees but carried out by a paid director who is not a trustee. Administration includes all of the overseeing and directing (decision-making) functions not specifically reserved for trustees. The usual administrative functions include:

- a. **Planning**, both strategic and tactical, to accomplish goals.
- b. **Organizing** the total effort.
- c. **Controlling**, assembling and analyzing data and directing the institution's operations.

Administrators are responsible for all actions necessary to reach the goals set by the trustees.

**4. Leadership** - going out ahead to show the way - is available to everyone in the institution who has the competence, values, and temperament for it.

In summary, then, **trustees** as a body are legally in charge, and they **manage** the institution. **Administrators operate** the institution under general policies and goals set by the trustees. Anyone can **lead**. Trustees lead the administrators. Administrators lead the trustees and the staff. Also, sometimes, leadership comes from unexpected places and from people who were not suspected of having it.

**Trustees lead but they do not administer.**

**Administrators both administer and lead.**

**Staffs both administer** (because everyone makes some decisions, however small, about what should be done)

**and sometimes lead** (because the structure is open enough for anyone to lead who can effectively assert leadership):

**The Staff's primary task, however, is to perform the tasks of the institution.**