

Transcript – Episode 58 – [Share Power to Strengthen Your Board with Mike Burns and Judy Friewirth](#)

Dolph Goldenburg: Welcome to the Successful Nonprofits™ Podcast. I'm your host Dolph Goldenburg bringing you a fantastic interview from two thought leaders of the Board Leadership Forum that is board sources biannual conference this year being held in Seattle. Today, we will be talking with Mike Burns and with Judy Friewirth about your board leaders. Sharing power may sound like a radical idea, but we're going to explore it today. Now, we have probably all been a part of board transitions and so often what we see is five or 10-minute discussion in the board meeting, “Hey, who wants to be the board chair next?” And either someone steps up to the plate or gets cajoled and wrangled into it, and then at the next meeting suddenly everyone's standard of them saying, hey, where's the agenda, what are you doing? And sometimes they feel on the spot, and ometimes they rise to the occasion, but it's often a very difficult transition for people assuming the board chair position.

Now, if you have ever seen this happen at a board meeting, today's conversation with Mike Burns and Judy Friewirth is absolutely for you. Mike Burns is a partner of BWB Solutions, and he has led nonprofit management assistant organization is the executive director. He did that for over 15 years. Now, I also have to tell you that he has an incredibly full resume so we cannot go through it all today, but he is currently serving as an associate professor of management at Antioch New England Graduate Schools. We also welcome with us today and Judy Friewirth who is the principal consultant at Nonprofit Solutions Associates in Boston. She has been a consultant, a trainer and a researcher for over 30 years in this field. Both of our speakers have been working with the alliance of Nonprofit management around the topic that we're going to be talking about today, which is that transition [in] shared leadership. So without further ado, we are going to play the music and welcome Judy and Mike to the podcast.

Judy and Mike, Welcome to the podcast.

Mike Burns and Judy Friewirth: Thanks. Thank you.

Dolph Goldenburg: So one of the things I failed to mention in the intro is I think all did a survey with nonprofit boards. There was like 630 something. Yeah. All right. So tell us about this survey.

Mike Burns: we should precede that by saying, look, there's not a lot of data out there about what actually goes on to train and prepare board chairs further work. And yet, most of them have somebody who got up to be a board chair. And what we know is that there's very, a lot of prescriptive data, a lot of prescriptive information telling you the board chair what you should do and be. But there's very little that we know about what they really do or how they got trained and what their experiences are. So we said, hey, somebody should do something about that. And that somebody is us the Alliance for Nonprofit Management, the Governance Affinity Group. We had produced have produced the largest survey of a board chairs, uh, ever conducted. Much of the surveys that had been done in the past. We're not actually from chairs, they were from eds.

We said, wait a minute, that's not the source. And so both, because there's a lot, not much data because it wasn't from board chairs. We said we need to change that.

Dolph Goldenburg: So, I'm going to nerd out on your real quick, and Judy, maybe you can, you can answer this question, how did you select the nonprofits that 635 board chairs there were going to be participating in the survey? How did you reach out to them and how did you engage them?

Judy Friewirth: So, what we did is something called a snowballing technique where we used our networks and connected with foundations and nonprofit associations and other organizations that could help us. And then they in turn sent out the link to their network so that it started with a small group and then expanded and expanded and expanded. And as Mike said, this was the largest study to date directly from board chairs.

Dolph Goldenburg: Did you capture a picture of what these nonprofits look like? Are they big? Are they small? Are they human services? Are they healthcare? What are these nonprofits?

Judy Friewirth: It was quite diverse. It represented almost all the states across the u s and very diverse group in terms of annual budget, primarily on the small to mid-size, a little bit less on the very huge nonprofits that often act more like corporations. So, we felt pretty confident in the diversity and the types of nonprofits that responded.

Dolph Goldenburg: And what were some of your key findings?

Mike Burns: Chairs don't do a lot to prepare for being chair.

Dolph Goldenburg: So do you ever feel like you do research to find out something you kind of had a hunch about already?

Mike Burns: Well, that is actually be a motivator to do research is to say, you know, is this true? We talk a lot in our group how there's so little evidence based in anything in our field about governance. So this was, you know, learning that board chairs don't prepare, provides us with the fodder to figure out, well what would you do? One of the things we learned interestingly is that board chairs don't do a lot of reading. They don't go to a lot of training. But if asked, what would you like?" they said, give us a mentor. Now that's not what we would have expected, but that's a learning that everyone can say, all right, we're in the capacity building field. Let's go figure out how board chair should give them.

Dolph Goldenburg: And how does a Board Chair get a mentor?

Mike Burns: They do refer to CEOs. They look at other board chairs, previous board chairs.

Judy Friewirth: Yeah. And there are, I'm now they're beginning to be more training programs and where there's a pure learning so they can be a mentor for each other. There are buddy programs

where new board chairs will be matched up with those that are more experienced. We found when we asked how they did learn, that they would observe the previous board chair and so what's can be worrisome about that as if the previous board chair is not very effective. They're learning in effective leadership,

Mike Burns: Generational bad chairs, basically one bad chair after another.

Judy Friewirth: And what Mike said about the lack of research, this actually is a significant problem in the field in the nonprofit sector. It's not just around governance and boards, but much of what is out there, as Mike said, is prescriptive, and it's not based on much of anything. So, the research that's being done in governance is fairly new. It's now expanding, but it's fairly new compared to other areas of nonprofit practice.

Dolph Goldenburg: What are some of the other things that you're finding as you do this research?

Judy Friewirth: One of the things we found in this previous study, and now we've expanded that we'll talk about for this new study that we're doing. But we also found that in asking about the board chair's role, they were very much focused on what happens in the board room, a very insular perspective versus seeing their role as providing some leadership in the external sphere – connecting with potential funders, connecting with constituents, with key community leaders. So, we were surprised that at that data that it was so much focused within the board room itself.

Mike Burns: I think we also note that CEOs are still the big driver, that chairs rely very much on what the CEO says or does. If boards are the owners, but CEO's are the drivers, then when does ownership begin in it?

Judy Friewirth: So, we began our follow-up study, sort of a part two that we're very excited about, and we decided to take it the next level. And we were very interested in looking at, what about the other board leaders? What about the vice chair? What about the other officers? What about committee chairs? They all take different pieces of the leadership, and so we were interested in looking at, how do they share those responsibilities and share power? What is the vice chair do anyway?

Mike Burns: Succession is probably the bigger driver that came off of the board chair study, which is to say, well how did they get there? And so this succession question is a big one and vice chairs have typically looked like the succession plan, but they look like that. We don't know that that's fact.

Dolph Goldenburg: You raised a really important question, Judy, and I get this from clients all the time with the exception of just waiting to maybe become chair one day, what does the vice chair do? I hear this all the time from clients.

Judy Friewirth: Is that unrealistic that one person is responsible for all of these responsibilities? So we asked a question, is it too much responsibility? Particularly because of the vice chair doesn't do much of anything. And what we're beginning to see in the data is that people feel it is too much. It's too much time, and it's too much responsibility for one person. So, we're interested in looking at it, how can some of those responsibilities to be shared so the work can be much more effective for the board?

Mike Burns: Yeah, we're very early in this research. We've only have 110 respondents. We've only had the survey out for about a week and a half. What have we learned is really new, not as nuanced as it will be once we add in more numbers. I would offer though that there's not a lot of people out there that I've ever asked vice chairs what they do. A hundred responses, even if half of them are board chairs, is way more data than existed before we even got those hundred and 10 responses.

Dolph Goldenburg: So what are some of those models for shared power?

Judy Friewirth: Well, we're beginning to explore that. One may be, well, what else can the vice chair take on from the board chair so that there's more division of labor? There are some boards around the country that are using co-chair models, and there are others that are really sharing it. So even the committee chairs are taking on much more of the responsibility. So, there's a number of different ways, and most likely we're not going to be recommending there's one right way because every board and every governance system is different, but there certainly could be ways that the responsibilities can be divided up.

Mike Burns: The only thing we do know for so far with our 110 responses is that there seems to be some leaning for vice chairs to lead strategic planning, and they are sharing the ambassadorship role of the CEO and some of the mentoring role of the rest of the board. So the early numbers around.

Dolph Goldenburg: For some of my clients, the vice chair leads the governance committee. So essentially what they're doing is they're building and creating and shaping the board that they're going to inherit. I do you all see that very much.

Judy Friewirth: There are some words. So then where the vice chair does focus more on the internal workings that a board development committee would be doing and the board chair focusing more on the external. You know, and again we'll see more of that through the data, but I would predict that that's a small minority of the current boards in this country right now.

Dolph Goldenburg: I was the executive director for seven years in an organization that had a cochair structure. So instead of one board chair, we add to co-chair. We were in LGBTQ community center. This way we could always have someone who identified as a man and someone who identified as a woman, as our chairs, if you will. But while I was there, it always really worked out beautifully because we were able to recruit people with very complimentary skills and personalities, and they could kind of divide the labor up. And so, co-chair was not as

exhausting. We also had two-year terms for co-chair. So you know you were two and done. So we did a lot of things to try to keep that position from just really being exhausting. But again, like as I look back on that, so often I would see them, they would essentially divide up the board. And so, I don't remember if we had like 12 board members. Rhonda might take six and Ray might take six and then they became, if you will, the relationship managers for those board members. If there was an issue with reach out to them or you know, if they needed support, would be the ones who reached out to them. Do you see that much with the co-chair model?

Mike Burns: If you take the arts and healthcare right, where you a medical director and administrative director, or you take arts where it artistic director and administrative director or some combination, those are very clearly defined roles, expectations. Folks know what their job is. They're both held accountable to the board. The big concern of course with any sharing and with all the positions is accountability. Who reports to whom and what is expected of you? Certainly in the healthcare and medical models rather health care and arts models, we know that those can work and that that division of labor is very clear. I think it gets fuzzier and other, other environments at times. But you know, again, as long as everyone's specific, then you move. But that's prescriptive. We're still trying to figure out if that's what folks are doing.

Judy Friewirth: That's been happening for quite a while. And in certain parts of the sector, but less so in the boards in governance. In our first study we asked about do you have a co-chair model or not? And it was a very small number. So, we think that that's probably pretty small. But back to the executive director or CEO, that's a growing trend to look at other models. Is it always the best to have the single executive director or are there alternatives? So what's happening in both ED world, and we're looking at it in terms of the board sector

Dolph Goldenburg: As we explore those units to be considered a specific individuals for that as we probably should go back and look at their grade school report cards around things like plays well with others, share as well with their friends and classmates. Because I would imagine that those are really critical skills if you're going to be sharing power with someone.

Mike Burns: If the reason that many board members become chairs is effectively a popularity contest, then playing well with others becomes the criteria. We've learned that's the biggest reason nobody else wanted the job or I was the only one who wanted the job. Those, those are your two big answers, right? So getting to have those for like sharing, that's going to up the ante.

Dolph Goldenburg: That makes a lot of sense. Mike and Judy, we're gonna take a short break, and when we come back, we're going to talk about activities and exercises that boards can do if they want to explore the possibility of greater power sharing.

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We are back with Mike Burns and Judy Friewirth, and I am hoping we're going to be able to have a little bit of a conversation about some of the things that boards can do if they want to prepare or experiment with more power sharing.

Judy Friewirth: One area that we're actually asking about in our survey this time is I'm asking them what kinds of skills, expertise, personal attributes are necessary for a leader of the board. There's been very little research on that. So, in terms of exercises we are developing or have begun to develop a self-assessment tool that leaders can take a look at some of these areas of expertise or skills and group dynamics and so on and then see how they rate with that in terms of them possibly sharing with other people. So that's a possible tool that we're looking at that might help words with thinking about this question.

Mike Burns: I think we also have to recognize that all boards are not equal. So you have stages of development, you have resources; there's a variety of other variables that affect how boards behave. And so I use this four stage model where in infancy stage board members are not focused on governance. They're focused on staying alive, getting the job done, getting work put out the door. The next stage they may go and hire somebody to do this stuff they didn't like doing in their infancy stage, and then they still want to do some of that stuff. So they are still sort of micro involved, and then they all get tired and they move into this next stage where they don't want to do any of that stuff, but then nobody's doing anything except for maybe the person that they hired. So governance kind of goes out the window and so does operations.

And then finally the everybody settles out, and it kind of works well, and the maturity happens and board starts focusing on governance. I think the amount of time to ramp up to actually focus on how do you do your fiduciary duties, how do you then get even outside of those fiduciary duties, what is our fiduciary duties? All of that is a part of the factors are the variables that affect whether we can share or not, whether or not we want a different structure. Who's going to be at our table? What characteristics do we need to bring to the table? When we take the stages of development, we talk a whole new level of, of detail that says different boards are going to have to respond differently. And sharing power at the early stage of development when you're really driven by founders is really difficult. So you know, we may be talking that this is a mature stage board that can do this more prepared to do it then it may be in the early stages.

Judy Friewirth: So, another growing trend related to this research but related it to other research for the board is, how does it begin to share power or even decision making with its constituents or external stakeholders? So, you know, does all the power need to be in that small group of the 12, 17 people? So, that's another kind of growing trend that's out there so that boards are beginning to think about, maybe it's not just that small group, but that they need to be more accountable and interact more actively with their communities.

Mike Burns: The Nonprofit Quarterly did the story on the college and Pennsylvania where the hell they were sweet briar. They are going to close. The trustees were going to close the college. The alumni came, rallied around and said, no, you're not, and it changed the way the board made decisions. It changed who was going to be on the board. Now, it's more integrated where

alumni play a large role. They also went out and got the money to keep the place going. Once they got involved, it changed the nature of who was at the table and the motivation for folks, and trustees weren't then in a little, you know, eggshell that was operating free from anybody else. They are now accountable to the very constituents that they work with.

Dolph Goldenburg: Would you say that some board members stepped down alumni replaced them or did they bring alumni onto the board as an addition and expand the board or none of that?

Judy Friewirth: They removed some of the board members and they brought on another board member, so they did change some of the compensation.

Mike Burns: The alumni were the folks that got the mood. Yeah. The, the trustees weren't voluntarily saying, "Oh, let's go." That wasn't the scenario. It was more alumni were really angry and because the trustees weren't answering or weren't listening, and then they slowly got the trustees who said, "Hmm, maybe not for me." And then they moved on.

Judy Friewirth: And they did have a new board chair. That was part of the change. And the board chair actually made a big difference in terms of helping to set up structures so that the alumni were now part of some of the decision-making. So the board chair made a big difference.

Dolph Goldenburg: How did this person, this new board chair at the college prepare to take on that role?

Judy Friewirth: From what I understand, she had been involved with the school, so she was knowledgeable about what was going on.

Mike Burns: Yeah. I thought she'd been around a while. And so, I think she had deep experience with the organization, deep passion about what made sense, enough workable knowledge to be governing so that it made sense. She took on a leadership role and action that evidence would suggest she knew enough. If you look at community action agencies or community health centers where there's actually legal requirements that the community be engaged, they all struggle with both figuring out, you know, when you're talking about folks who it's hard enough to wake up and deal with life every day, and now I want you to also though serve on a board and make big decisions about multimillion-dollar activities. That's not easy stuff. And so, they had this legal requirement says you got to play with us, and then playing as hard. Sharing with the community is tough when lots of things are at stake, and the community that you're sharing with has enough struggles every day that trying to run a big organization is not really fit on their radar, nor do they have the experience. If I'm going to pass a budget for \$20 million, I don't even have a car worth a dollar figure – that one out.

Judy Friewirth: So, I'm working with a group now it's saying the constituency are formerly homeless families who live on this developed property, and they are part of the decision-making

with the board and sharing it. And so, there's training. How do you read a budget? How do you facilitate meetings? All kinds of leadership skills. But it's working incredibly.

Mike Burns: That's a key element is that if you expect folks who have no experience to serve, serve well and to feel satisfied about their service, you have to work hard to make sure that they are included in understanding the details. Training happens at every meeting. It's not occasional training. It's not one board retreat. Every meeting sets time aside for training.

Dolph Goldenburg: And I do to share with you, one of my pet peeves that boards do is they do a board orientation session, and I mean singular session, whether it's 90 minutes or 12 hours long. And they go, "Okay, now we have trained you. We have informed you go out and be good board members," and they just expect that you're going to just automatically be able to integrate yourself into the board and be a productive, successful board member.

Mike Burns: We know better. And so, we just need to even turn to the adult learning world, and they can teach how you do that.

Judy Friewirth: And so that's why I think the strategy of a mentor or a coach could be very effective, particularly if it's over time or regular training for any kind of board member.

Dolph Goldenburg: So, all of my guests, I was asked some kind of interesting Off-the-Map question as part of the conversation. So, what I would like to ask both of you, where have you had the greatest difficulty in sharing in your life, and what tools have you used to overcome that difficulty?

Mike Burns: So, I'm an adopted child. And so not sharing is really easy, so I don't.

Dolph Goldenburg: Judy, how about you? Where have you had the greatest difficulty sharing and what have you done, you know, to help yourself overcome that?

Judy Friewirth: Flying out here, I had to share my seat because I sat next to someone who is extremely heavy and big, but this has happened multiple times. And then I finally asked the flight attendant, I said, you know, this is not working. Can you find me another seat? So, that was out of a literal sharing.

Dolph Goldenburg: Thank you so much to both of you for coming on the podcast today. Before I let you go, I do want to make sure that all of our listeners know how they can reach out to you. First of all, I would encourage all of our listeners to go to Mike Burns', his blog. It's an incredible blog. Obviously it's about nonprofit stuff, and it is one of the top 100 nonprofit blogs in the world. And so, you can get to his blog at www.nonprofitboardcrisis.typepad.com, and I'll just tell you, it's an incredibly active blog. I was on it this morning. It looks like it's updated probably four or five times a week, which means he's probably up at 4:00 AM every morning writing. And then also for folks who are interested in engaging Mike, um, and through his consulting practice, you can go to www.bwbsolutions.com. For Judy, I strongly recommend that you go to her consulting

firm's URL, which is www.nonprofitSA.com. Now, the other thing to keep in mind is they did this research for the Nonprofit Alliance, and so make sure you check out the www.allianceonline.org. We will of course put all of that in our show notes. I also think we're going to include a link to the results from the past survey and an upcoming survey. Right. Can you all say a couple of words about the upcoming survey?

Judy Friewirth: Sure. We're looking for board chairs, vice chairs, board officers and committee chairs. If you're one of them, we would love to have you participate in this new survey, and we will have the link to the survey up on the site as well. And also we'll have a link to our past report of the board chair study that we refer to.

Mike Burns: Both are currently on the site. So, you can go to the <http://www.allianceonline.org/>, and you'll find the survey link and the copy voices look for voices, that's the word. And that'll be the research report for the last survey. All right,

Dolph Goldenburg: well again, Mike, Judy, thank you so much for coming on. I'm grateful you dad.

Judy Friewirth: Thank you. It was great to be here.

Mike Burns: Same here.

Dolph Goldenburg: Once again, check out the show notes. It's www.successfulnonprofits.com to get all of Mike and Judy's contact information. In addition, make sure you check out the website www.allianceonline.org and see the results of the last survey and find out how you can participate in future surveys. Now for me, I think the big takeaway from today is that it's really tough to be a board chair on your own, and the best way to go about being a board chair is defined other leaders on the board that can support you. So that's my takeaway, and I will certainly be using that takeaway as I work with clients and nonprofits. Now, if you know an organization that is preparing for a board leadership transition, make sure that you send them a link to this episode of the podcast. I promise you it will be beneficial for the organization and they will thank you for it. That is our show for this week. I hope you have gained some insight that will help your nonprofit thrive in a competitive environment.

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