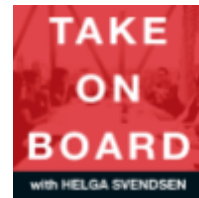


Take on Board



Co chairing a board

Hi folks, it's Helga. Today, we're talking about co-chairing boards and committees and you're just hearing from me!

I have been a fan of job-share for years ... as long as it's done well.

And I think some of the principles of good job share could apply to board room roles such as Chairing the board or committees.

So, today I'm going to talk about some principles for co-chairing and then talk you through a live example – when I was co-chair of an organisation. We certainly didn't do it perfectly, but we did it, so you can learn from what we did well and what we might have done differently if it's something that you want to explore for your board.

Let's start with some principles of role sharing.

First and foremost – **choose the right partner**. The people who will be co-chairing should choose each other, not the board choosing for them.

Secondly, **decide how to slice and dice the role**. Be clear on who is responsible for what.

Thirdly, **communicate communicate communicate**. Don't leave things unspoken between you and your partner, nor between you and your key stakeholders – the CEO, the board, external parties. Make sure it's clear who is responsible for what. And seek feedback on how it's going for everyone.

And there are some other things to consider – you need to get the support of the board and staff and you'll need to manage expectations and perceptions. You might also need to battle the bias to even having a shared role.

So let me take you through my story of becoming a co-chair, and use these principles as a framework.

Firstly, some context.

A few years ago I got a call about joining the board of the Centre for Sustainability Leadership. This was an organisation that I had been interested in for years – I knew quite a bit about their work from alumni and other partners and knew they did fantastic work. I had already applied to join their board a couple of times and had not been successful as there hadn't been a strong enough skills match each time.

So when I got a message to call Alex Graham, the Chair of Centre for Sustainability Leadership about a board role, I was a little bit glib – I planned to tell her, ‘sure, I’ll apply but this is the last time – three strikes and you’re out’.

So I was unprepared when she said to me “Helga, we’d like you to apply ... for the role of Chair”.

Alex was the current chair, but she wanted to step away from the Chair role because she was about to have her second child. She wanted to stay on the board but didn’t have the capacity to chair. No-one else on the board wanted to take up the role.

At this stage, I was only a couple of years into my own business and was also on another board. I just didn’t know if I had the capacity. And coming in to a chair role from ‘outside’ and organisation could be challenging.

I told Alex that I had to think about it.

I thought about it long and hard. I really loved the work of CSL and wanted to be part of the organisation. I thought I had a good contribution to make – I had already been on the board of a number of organisations, including not for profits, and my work was – and is – in strategy and planning, governance and stakeholder engagement. I had undertaken similar leadership programs and knew the transformative nature of an immersive leadership program. I loved what they did. I knew this could be of value to CSL.

But I also knew that I couldn’t take on something that I couldn’t fully commit to. I’m sure you’ve heard me say before that my rule of thumb for a board role is about 15 hours a month, and a chair role is generally double that. I wasn’t sure I had 30 hours a month – basically a day a week – when I was also building a fledgling business.

So I started to wonder whether I could share the role with someone else. Having worked in the union movement, in a predominantly women’s white collar union, I had been a strong supporter of job share for decades and had even run a case about it in the industrial relations commission many years before, so I knew some of the principles of what makes it work. I had proposed co-chairing a committee at another board, and in that organisation we had interviewed job share applicants for CEO. Perhaps this could be the answer here?

So, using this as a case study, let’s go through the principles.

First, **Choose the right partner**. As soon as I landed on this idea, I started thinking about ‘who’. I landed on a person that I thought would be a great partner – we had some similar and some complementary skills, networks and experience. He was actually a client of mine, so we had worked alongside each other on things. The more I thought about it, the more I thought that if he was up for it we could make it work.

So – knowing that it’s also important to have the support of the organisation– I rang Alex to see what she thought.

Her response surprised me. “Helga, I think the board would support that. And if you want to share the role, why don’t WE do it together”.

Working with Alex had definite appeal – she was the current chair, she was an alumna of the organisation, she had the history. She was in NSW, I was in Melbourne so we covered the main geographical areas for CSL. However, I hadn’t actually met Alex before, so didn’t have the experience of working with her.

So I flew to Sydney to meet her. It was kind of like a first date, although like all good first dates, we didn’t just rely on our ‘first date’ for our connection – we had a number of phone calls too. So by the time we got to our ‘first date’, I was pretty confident that we’d be able to have a second and third!

In our meeting, we talked through how we would work together and how we would share responsibilities.

Which brings me to principle two – **decide how to slice and dice the role**. I wish I could find the paper where we mapped this out, but it’s now lost in time. However, we talked through things like who would chair meetings (I would chair for the first three months while Alex had leave for the birth of her child, and we’d then rotate between us); who would be the key contact for the CEO (me); who would be responsible for different parts of the board portfolio (me for finance, and we would share the business development, her for alumni as she was one of them).

There was more on this list but I can’t recall all the details. The key thing if YOU are thinking about co-chairing is make the list of EVERYTHING and allocate what is yours, what is theirs and what is shared.

Note that you won’t necessarily FOLLOW the list ... but if you have it, it helps to know what’s changing and you can adjust as you go.

We also agreed on how we would communicate between ourselves – I think it was either weekly or fortnightly phone calls, at least in the early days, that could revert to longer between drinks as we got more used to each other and how we work.

We considered a joint email for us, but decided that wouldn’t work and that we wouldn’t need it if we had good communication otherwise. We thought having a joint inbox might actually slow things down.

In short, we worked through a lot. We thought we could make it work. The board agreed – it formally went to board and they formally interviewed me - and off we went.

Now, I must admit, it didn’t work anywhere near as neatly as our lovely little table of responsibilities!

For Alex, things at home were more complex than she had anticipated so it’s fair to say she had less time than she had initially thought.

Again, we communicated well. Alex wanted to step down from the co-chair role as she felt she wasn't pulling her weight. I asked her to stay in the role – knowing that she wasn't doing half the work. For me, having her as an equal, trusted confidant for me as a relatively new person in the role of chair was invaluable. I could talk to her about things that you can't always share with someone who is 'just' on the board. And, as a new person to the organisation, I probably had to spend more time just getting up to speed anyway so it wasn't just an equation about time spent. It was about sharing the responsibility and the weight. She was doing the latter, even if she wasn't doing all of the former.

So, even though it didn't work as we had first expected, it worked.

Another factor was that CSL was going through a pretty tumultuous time during. We were just over 10 years old, and this meant that some of the philanthropic support we had enjoyed in our earlier years was starting to dry up as we weren't as bright and shiny and new any more. And we simply were not sustainable without that financial support – which is kind of ironic for the centre for sustainability leadership. So we were on a transformation journey to a sustainable business model. Having Alex's direct experience and insights about the business, the alumni and the stakeholders during this period was invaluable. And even more invaluable when we eventually went through the wind up process – but that's a story for another podcast – and one about why 'the end game' can actually be a positive experience for organisations!

So, for us, co-chairing worked even though it didn't work as expected. And it worked because we used the principles of having the right partner, agreeing on roles and responsibilities – and re-agreeing when the initial plan didn't come to fruition – and always communicating well. It didn't always work perfectly, and it definitely didn't go according to plan, but it worked.

Sharing roles is a great option in governance. It might be chairing the board – like Alex and I did – or it might be about chairing a committee.

It allows organisations to have access to complementary skills in leadership roles. And for volunteer roles, it can help to ensure that the time commitment is manageable – although it must be said that co-chairing is no half the work. It's probably 75% as you can share the role, but you need to make time to communicate properly between you and that takes extra time.

And it means that organisations get to keep the incredible skills, experience and expertise of someone like Alex in the Chair role when she's about to have a baby. That's good for everyone – we already know that equality and diversity in the boardroom is a good thing, so the more we can keep women in leadership, through all their stages of life, is an excellent outcome for everyone!

Sharing responsibility can come in a variety of guises. Other ways I have heard of this being done includes having someone Chair the finance committee and someone else as Treasurer. This isn't a formal job share arrangement, but it ensures that two people equally share the

responsibly around finance. That means there's succession planning as well as mitigating key person risk if one of those people has to step down.

I've also been involved in a board where we didn't get the support of the board for co-chairing. This was for a committee role, and I and another board member – a young woman – proposed that we co-chair a committee. This wasn't supported by the board although this was now over 10 years ago and I'd like to think that it would be a different outcome today, particularly given at the same organisation we interviewed job-shared CEOs around the same time.

Again, sharing responsibility for leadership roles is great. For some time we have known this works at an operational level, and I'm looking forward to a time when it's more common in the boardroom too.

So, in summary, co-chairing is awesome. We need more of it. It's more and more common at an operational level – that is, jobs within the organisation being shared and other flexibilities – and we now need to explore flexibility in the boardroom too.

I hope that sharing some of the principles here, and the story of how we made it work, helps YOU to think about how your organisation might be able to do this.

Indeed, if your boardroom already has this type of arrangement, I would love to hear more about it, and I'm sure others in the ToB community would love to hear it too. So how about we continue this conversation over in the Take on Board community on both FB and LI.

That's it from me for this week – thanks again for tuning in, and for being part of the incredibly supportive ToB community. I'd love it if you could share this pod with someone you know, and encourage them to subscribe to continue to hear these sorts of stories.