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SPEAKERS

Helga Svendsen, Rachel Lowry

- H** Helga Svendsen 00:00
So today on the Take on Board podcast, I'll be speaking with Rachel Lowry, and we'll focus on what it takes to be an effective board member.
- H** Helga Svendsen 00:07
Rachel is the chief Conservation Officer at the World Wildlife Federation, WWE, Australia and past president of the International Zoo Educators Association, and former chair of the Center for Sustainability Leadership. She also currently sits on the Parks Victoria Advisory Committee and the Zoo Wise Advisory Committee. Rachel leads a team at WWF Australia focusing on delivering transformational conservation results that help nature and people. Rachel is also advisor to Australia's Threatened Species Commissioner. And prior to joining WWF, she led the development and delivery of Zoos Victoria \$30 million Wildlife Conservation Plan, which has made a considerable impact in helping to fight the extinction of species from the world's most endangered crocodile. Through to Victoria's Eastern barred bandicoot. Rachel has developed an award winning program that has tackled conservation and sustainability issues both locally and globally. With the 'Don't Palm us Off' campaign, influencing the food labeling processes of palm oil within Australia and abroad. Unsurprisingly, Rachel was awarded sustainability leader of the Year by WME 2010 and was profiled in Melbourne top hundred most influential people through the Age newspaper in 2011. In 2016, the Australian Geographic magazine listed Rachel among Australia's top 30 conservation heroes. In 2018, Rachel's contribution to

conservation and gender equality in the workplace was recognized which was awarded a position on the top 50 women in the Victorian public service by the Institute of Public Administration Australia. Rachel's current focus is to lead and support the talented conservation team at ww Australia to drive impactful and innovative solutions that advance the health of our planet, or securing a new deal for nature and people.

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Helga Svendsen 01:59

I first met Rachel about six years ago, when I was doing some due diligence about a role with the Center for Sustainability Leadership, where she was previously chair, and I'm now currently the chair. When I met her, I knew she was the sort of person I had to keep in touch with. She's wise, passionate and engaging. So I know you're going to love my conversation with Rachel today. Welcome to the Take on Board podcast, Rachel.

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Rachel Lowry 02:23

Thank you. Great to be on board.

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Helga Svendsen 02:24

So Rachel, today we're going to talk about being an effective board member. But before we explore that, I'd love to explore a little bit more about you. Tell me what was young Rachel like? And when did you get your first inkling about where you'd end up today?

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Rachel Lowry 02:40

Young Rachel has been a wildlife enthusiast. All my life really, my earliest memories of enjoying myself has been centered around my father's farm, I was really lucky to grow up on land. And I just was always fascinated with animals. So I'm not surprised I've ended up where I've ended up. Although, you know, when you're someone that loves animals, and you're a kid, you're often told you're going to end up being a veterinarian. So I always thought I'd become a bit of work that I was going to be pretty hopeless at that because putting down animals was never going to be one of my strengths. And I discovered on my journey towards trying to become a bit the world of zoology. So I think young Rachel was always very much outdoors was always trying to find a way to help animals originally, they were my entry into nature. Whereas now I suppose I'm making moving trying to find a way to benefit nature more broadly. But certainly not surprised of in where I am given my love for animals in terms of governance,

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Helga Svendsen 03:40

What what was your earliest experience of governance?

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Rachel Lowry 03:43

Well, actually, it's from for the Center for Sustainability Leadership, where you and I first met, that was my first entry point. Because I was lucky enough to secure a nine months fellowship with CSL where I did the course and throughout that those nine months met the incredible CSL network, you know, the people that are giving up their time and their energy in the evenings to try to work out how we can connect through every sector of society and make sustainability a movement that's not just part of the environmental movement. So I was actually one of the few in my year that actually worked in the environmental sector. You know, there were lawyers and engineers and doctors and I loved about CSL.

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Rachel Lowry 04:23

So at the end of that fellowship, I found myself feeling a bit lost. I didn't want to go back to my silo in the environmental sector. And so I reached out to Larissa Brown at the time, who was CEO and the founder of CSL. And I said, "I'm missing our Tuesday night sessions and the weekend groups and what's your advice to me?" and her advice at the time was "Why do you think about joining the board? You know, why don't you help us make CSL a bigger, better organization?" and I had experienced firsthand is the magic of the organization, the networks that opens you up to the thinking that the blink is it takes off. And so I think had a coffee with Cameron Brown at the time, who unfortunately has passed away and so longer with us, but he was a critical part of establishing CSL from a strong governance perspective. You know, Lisa Brown was very much the passion and she had the vision and Cam came in and did a lot of work establishing board, making sure that everything was above board. And he welcomed me onto the board with open arms. And so that was my first step into the world of governance. Interesting.

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Helga Svendsen 05:28

I mean, there's already things in there about being an effective board member about, you know, about Larissa pointing you in the right direction, Cameron then bringing you on. Can you remember your first board meeting? Can you tell us about that?

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Rachel Lowry 05:40

Yeah, I can remember being really impressed because what I was hoping to see from the board was not a group of environmentalists sitting around, just talking enviro speak. And so I remember feeling instantly relieved, because we had a lawyer on the board. And we had someone who was running in a really successful up and coming tech business. And we had markets here. And so straight away, I thought, This is what I was after. I was after meeting with a group of people with shared values, who all bought into this vision that see it's all about, but who are going to give me exposure to the different fields because I honestly believed I'd be better even in my day to day job at the time I was working for the zoo heading up. I was actually running their campaigns or environmental campaigns. And I just knew inherently I'd be a better environmentalist and conservationist if I had exposure to people in different sectors. So straight away, I was super impressed Cameron, a very professional show. He had done he's Australian Institute of company directors training. He had everybody inducted on the board, they received The Book of the Board by David Fishel, who became a bit of a Bible for us all. And what was really fun, it was a very fun first board to sit on. Because what's unique about CSL is it's about trying to upscale and connect young, upcoming leaders. And so it was an interesting board, because the majority of the board was quite useful in the sense that people were all in their early 20s, they were wise enough for them to recognize that the board needed to have that sort of wisdom and experience and that sage advice that comes from people who said on many boards and before and so it wasn't just a young board, but it was a very fun board to be on. So my first meeting, went off with a bang, I knew I was going to love it. And I did.

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Helga Svendsen 07:28

It sounds like you had a really diverse board.

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Rachel Lowry 07:31

Yeah, it was really diverse. And, you know, I'm gonna say a progressive board, because they actively were wanting to make sure that it was a board that had gender equity. So it was equal male, female, they had done a lot of thinking to the credit, again of Cam Brown, he had done a skills matrix and wanting to make sure that the board had the type of composition where we were really well rounded. The first six months sitting on the board was an interesting six months because the organization was really starting to establish itself profile. So there was a lot of discussion around how we position ourselves in the conservation sector, because we were wanting to position ourselves not just as a conservation focused organization, but as a leadership organization. So we needed to make sure we had a really professional tone. And even though there was a group of young 20 year olds, running it, we worked really hard to make sure whenever we put anything out in the marketplace, it came across as just in a well seasoned, professional elite. But have

we made sure everything was polished. And so there was a lot of work, it wasn't a board where you came and put in your hours and then came back again, the next month, there was an enormous amount of sort of offshoot committee work. But at the time, I didn't have kids, I had a lot more energy and time to give. And it was probably my first ideal board when I think about it. Because I don't think every board member that sits on every board can offer up their Saturdays and Sundays and their every second Thursday, you know, it's unreasonable to be very careful about how much you put on the board members. But at the time, it was a good board to me because I was desperate to give more. And so yeah, they make good use of everyone's time.

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Helga Svendsen 09:09

It's a great point about time and commitment for boards. I think often people think that being on a board isn't quite as much work as it might be. What are the sorts of things as a board member you've been asked to do? And what's your advice to others about the time commitment that's required to be on a board?

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Rachel Lowry 09:27

I think it's a really critical one. And my advice to anyone looking at stepping onto boards is know what you want to get out of the experience, not just what you want to give, and what they want to get from you because and be really honest and upfront about that there are some boards. And I always ask me, I get I get offered board positions from time to time where I'd straight up ask what's the time commitment because at different times in my career, I've been able to be an all in board member where you literally offering to run extra workshops for staff and go on field trips and help with every bit of media and every second donor meeting versus other side boards with they require less they might be the type of boards that have well established staff workforce plans, they're well capacity, they've got strong executive teams. And they may be saying no, I really want you for your experience and outside of board meeting, there will be little else, I would suggest if people can't give a little bit more time outside of board meetings, and you're probably not equipped maybe to step onto a board because I'm yet to ever find an experience where board members aren't needed to just a short period of time at five board meetings to help with it might be a crisis emergency, you need to be able to give your executive team at least some extra time. It's never going to be just a you know, five to 7pm on Thursday night. But definitely a discussion that needs to be had before you step on. Because I've seen it work well. And I've seen it not work well, when you don't get that balance. Right.

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Helga Svendsen 10:52

It's music to my ears, Rachel to hear you say that you're always asked about the time commitment required on a board. Because I could not agree with more that people organizations need to be clear about what sort of time commitment is required. And it's always a red flag to me if an organization says, Oh, yeah, we only meet once a month, that's a couple of hours. So it's only a couple of hours time commitment that's needed when we know that being an effective board member and just discharging your legal obligations as a board director takes much more than that.

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Rachel Lowry 11:23

Absolutely, absolutely. And your executive team often does need some counsel outside of board meetings, you know, you go get that balance, right. Again, you don't want to doing the job of the executive. But you need to make yourself available. And depending on the type and I've only ever sat on nonprofit boards, but not for profits are very donor centric. Often we rely on philanthropy and grants, etc. And so quite often those giving funding want to meet members of the board, because they want to know that you've got a board that's giving good attention to due diligence.

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Helga Svendsen 11:57

Absolutely. You just touched there on on the board and making sure that the board stays in that governance space and letting me executive run the operation. And particularly in relation to maybe not just in relation to not for profits, maybe it's all boards, but I'm wondering what what are your rule of thumb? Or how do you manage to ensure that the board is working in that governance space and not getting their fingers to dirty in the operation of the organization?

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Rachel Lowry 12:23

Through I think this is comes down to it's often the role of chair as well, the chair of the board should be making sure that there's really strong terms of reference our culture on the board, where you actually have that discussion about what does the organization need? At that point in time? What type of board does this organization need us to be? Because you know, if it's a startup, if it's early in in the organization's history, then surely they might need a bit more of a hands on board. If you've got a new CEO, for example, or a fairly new executive, you might need a more hands on board. But I think need also have a time when you say at what point do we start to lighten that touch, because a good board shouldn't be stepping in and micromanaging and doing the job of the executive, you need to have that fine line. So yeah, I think it's just about having those honest discussions, a chip, something that we could share should be keeping an eye on.

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Rachel Lowry 13:14

And I've been pretty lucky in the last decade, I've been both on boards and operating as an executive, as in my day to day Monday to Friday job. And so I think that does set you up to be an effective board member. Because I've experienced both sides of it. I've experienced boards where the board gotten the balance, right and really given the right amount of counsel focused on the right areas of due diligence and let their executive fly. And as a consequence, and I had strong culture in the org. But I've also said on boards where we haven't gotten that quite right. At that point in time, when we've had to pull ourselves up and say, hang on, I know we're really passionate here. But these are our opinions and in our executive have the right to make evidence based decisions. And it's our job to make sure that decisions are evidence based, but it's not our job to do it for them. For example, but I've I've been an executive where I've had board members get that balance, right and so empowering. I've had terrific board members where they're just there to give you that direction, but have that that moment of sanity check from time to time to make sure you've got your eye on the horizon. But I've also had board members that have had lots of time that have really gotten down into the absolute my new detail of the organization. And I've spent my time where I felt like you're managing the board member rather than actually getting on with your job. So it's a really important one to get that balance right.

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Helga Svendsen 14:30

And you mentioned in there. In fact, you've mentioned a couple of times when you were talking about CSL the role that can held in really bringing that board together. And again, here that how important the role of the Chair is, you were both the chair at CSL and you've also been the president of the International Zoo Educators Association. So in both of those roles, you had the opportunity to then lead the board, what's been your secret.

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Rachel Lowry 14:57

Taking on a chair all certainly is often takes a bit more toll on your time than a regular board directors position. That's been my experience. And so you know, I guess my secret is making sure that I step into roles where I'm really invested in the vision of the organization. Because it's not something I can't imagine anyone being a chair if they weren't fully bought into the vision and the mission. And so both of those organizations are a labor of love, really. And they both need very different things from me.

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Rachel Lowry 15:26

So CSL at the time that I stepped into that particular role I stepped in after Cam, it was going going well, there was a lot of interest in the fellowship program, we had some good Directors on board, we were in a growth sort of expansion phase, we were moving from Melbourne across the Sydney and running our programs, we just launched an online program. at that particular time, my key role was making sure that we built that strong cultural piece. So the vision was right, the planning was right. And it really needed some attention on the workforce planning some support of the current CEO, whereas when I stepped into the role of international Zoo Educators Association, it wasn't in a similar position, the membership base was declining instead of increasing, we'd lost funding, we were having all sorts of administrative challenges. And so I think my role of chair was to make sure that I equipped us with a board that wasn't just offering that sage advice and keeping an eye on risk that was off the board that had time to roll up their sleeves and really get into committees and do some hard work to turn things around. So you know, it's part of my role of the chair there was to actually recruit good board members, that were going to help complement the strategy that we needed to put in place

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Helga Svendsen 16:43

in your role in recruiting members to that board, then, what were you looking for? What are the sorts of things that stood out?

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Rachel Lowry 16:49

It is an international board. And so you know, I had to have a bit of a skills matrix. And it was a matrix, because I not only needed to make sure we had all the right skill sets. But on that particular board, we needed to make sure we had adequate cultural representation. I was very keen and I one of the first things I did when I stepped in as chair was do a member survey to work out what our members wanted from the organization. And there was some interesting insights coming back where the richer nations, let me say, so some pockets of Europe, America and Australia will feeling very well serviced. But that wasn't the case for some of the less advantaged nations. So as a consequence, I wanted to make a concerted effort to have stronger voices sitting at the table, making sure we had strong representation from India, where growth across the zoo education not only was needed, but there were lots of forming, of wanting to make sure that we had really, really strong voice from South America, because it was an area where in the market research showed that there were deep desire for capacity building across the news and education area there. And so I had to get to work putting out expressions of interest in the areas where, you know, I thought we were going to be able to secure strong candidates, I was very lucky that each region of the world has its own sort of Zoo peak body and so worked hard and fast working with those peak bodies to actually use them as a sounding board to

make sure that we secured people that were you know, right for the job, I was very lucky, we built a really strong board. And we were able to turn things around, we ended up having record growth over the period that I was leading that board. But that was absolutely the concerted effort of making sure there were clean discussions up front. This is not an organization you're joining that's in a growth cycle. We're currently on a downward trajectory where our job is to turn that around. So become to the board, we need to make sure that, you know you're coming with the capacity to give those extra hours because the first few years was tough work.

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Helga Svendsen 18:53

And have you come across a time where you've dealt with board members that aren't putting in that sort of time or aren't putting in the commitment that's required?

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Rachel Lowry 19:03

Yeah, I have. And actually, around that particular time, in my first year, we developed a growth strategy. And there was a lot of extra work for people on the board, because we were needing to work hard at reaching out to zoos across our respective regions to try to secure sponsorship and increase membership, etc. And the numbers told a really interesting story, because I had just this amazing recruit to the board from Latin American representative. And we saw just the registration numbers go gangbusters throughout that region. Whereas around the same time, we had a recruit in India that the numbers were just weren't seeing the same results. And we had to have some honest discussions where we had to work out was not that person who did have the capacity. And what I found was a person's daytime job had changed, essentially, and come on board. And so she was actually quite stressed and struggling was the juggle. And we ended up just deciding it probably wasn't the right time and ended up recruiting a replacement as a consequence. But you know, the role of the chair is to make sure you've got a representative around the table that have the capacity to actually move the organization forward.

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Helga Svendsen 20:14

Fantastic to hear because again, often it is absolutely the role of the chair and the organization as a whole to have the right people around the table. In my experience, not always the case that chairs have those difficult conversations that need to be heard

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Rachel Lowry 20:28

what I have found and and I've had times where that was sort of a drastic case, and we

ended up just deciding, maybe it's just not the right time, and it was mutual. But you know, there's been other times where I've had people on the board perform extremely well. And then all of a sudden, you felt as though it was a bit lackluster for a few months. And when you do pick up the conversation with people quite often they really like they say, I know, you know, I'm going through a tough time, your job as a board member, whether your chair or not, is to make sure you support your fellow peers on the board. We're not always going to be firing on all cylinders, every single month. But if you know that there is a tight time for one another, you can show to one another's work better. But you've got to have those discussions so that you know who need you to step into that space for a little while. And now how long they're going to need that extra support for.

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Helga Svendsen 21:14

Oh, Rachel, I could talk to you all day about this sort of stuff. And may we'll need to get you back again, another time to talk about some of the other things. But as we draw it together, I'm just wondering what what are the main points you want people to take away from today's conversation?

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Rachel Lowry 21:28

You know, I think we've talked about some of the challenges of being on on a board and making sure you've got the right time making sure you're supporting your peers, you're having the honest discussions, that you're getting that balance right between board and management, and so on.

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Rachel Lowry 21:43

But I also think if anyone's listening to the podcast, and they haven't sat on the board before, and they're thinking about it, being on board is done can be so incredibly rewarding. And my advice would be just being really clear on what it is you want to get out of the board experience. Because my first board that I just joined, I joined because I wanted to open up new doors to other sectors of society that I wasn't working within. And I was really clear that in my mind, and so I absolutely made that my advantage, you know, I was giving time to an organization of passionate about but I expanded my network as a consequence. And I've developed some of the most brilliant friendships off the back of it. But my second board that I stepped onto, I was really wanting to develop an international perspective, and learn about how we can make some inroads against you know, the conservation education movement through you know, different cultures culture that I don't work in all that overtime.

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Rachel Lowry 22:34

And so, you know, to do that I had to make sure I found myself appropriate mentors because I hadn't worked in some area, working in Southeast Asia is completely different context and experience to working through Europe, for example. But because I was really clear, that was my reason for joining the board. I also made sure I've built my own capacity in that area and sort of reached out to mentors who I thought had done that well and led boards that were truly international in the way they operated.

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Rachel Lowry 23:00

But you know, I'm starting to think about my next step. And I'm going to take my own advice. You know, I've done a lot of work in the last two decades in the environmental space. And that's where my heart lies, and where my Monday to Friday will continue to be. But I'm so interested in social justice issues, and I've had a few offers to join boards recently that are in the environmental space. But I think I would really love to understand more the social dimensions of conservation and get more involved in I'd love to serve on an on a board where the boards helping advance missions around empowering refugees, for example, that type of thing. So my suggestion would be people just be really clear on why you're going forward, and make sure it works for you and the organization.

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Helga Svendsen 23:04

Again, fabulous advice. And I'm loving hearing that you might be looking for a border and social justice and refugees and asylum seekers and so on, I will um, let's have a conversation at some stage. And I'll see what we can have a chat about and see what we can find because you I know your contribution to any board would be amazing.

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Rachel Lowry 23:04

Thank you. And it sounds great. Now I'm definitely I've got my hands full of WWF at the moment. It's an exciting time, but it's my first year at WWF. And so I'm thinking in a few months time once I've got the team in a position where we have a new strategic plan. And I myself have developed strong relationships with my current board. And it's all working well with my current CEO. A very exciting role that I'm in, I'll definitely be looking for a next opportunity. So I'll count me in for that convo.

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Helga Svendsen 23:42

Fantastic. Look, thank you so much for joining us today, Rachel, I know that the Take on

Board community are going to get so much out of this discussion. So thank you for sharing your wisdom with us today. I really appreciate it.



Rachel Lowry 24:40

It's a pleasure. Thanks very much for inviting me to reflect.



Helga Svendsen 34:56

I hope you enjoyed my discussion with Rachel Larry, today, she is such a fantastic person. And she really summarize some of the themes of her conversation there at the end about what's the time required? What's the support that you need to put in place? What's the balance between governance and operational? What are the skills that you need to have on your board, and also touching on how incredibly rewarding it can be to be a board member.



Helga Svendsen 35:20

One of the other things that stood out for me from my conversation with Rachel was engaging and really reaching out. So she talked about when she reached out to Larissa, who was the CEO of the Center for Sustainability Leadership and how that ended up in her joining the board of that organization. And eventually being the chair of that board. She talked about when she was with the zoo educators organization, how she did a survey of the members to find out what their issues were and what was going on to give her a better understanding at the board and the organization where they really needed to focus. She also talked about reaching out to board members when it looked like there might be struggling and really not being able to make the contribution that as the chair of the board she was hoping to get and how reaching out to them. And having a conversation can lead to either that person potentially stepping down or that person potentially stepping up into the role but being clear about those expectations and being able to have those challenging conversations, and really reaching out how that can help. And she also talked about reaching out to mentors, and being able to support find those mentors to support you in your roles on a board. None of that surprised me as I know that that's one of the things about Rachel her incredible skills and engagement really have helped her to succeed in her roles.



Helga Svendsen 36:42

And some great advice to others that are looking at being an effective board members for the their roles as well. Rachel also mentioned one of her favorite resources, the book of

the board by David Fishel, so I'll make sure I put a link to that in the show notes for this episode. And last but not least, if you do want to hear more from Rachel, she will be speaking at one of my regular board Kickstarter breakfasts. The next one is on Tuesday the 16th of July 2019. So if you're listening to this episode live, and in real time that will be coming up very soon. So I'll again I'll make sure a link to that breakfast is in the show notes or just have a look at the take on board Facebook community and you'll find a link to it there. She'll be speaking with the equally fabulous Michelle shepherd who is the Deputy Chair of the Jane Goodall Institute of Australia who will also be talking to on the take on board podcast coming up soon. So again, thank you for being with us today. And I hope you enjoyed this episode of take on board and look forward to speaking to you again very soon with some other fabulous guests.