

Take on Board Podcast – Episode 211

Transcript – Lina Patel knows how Aussie and US non-profit boards are different



Helga Svendsen 0:08

Welcome to the Take on Board podcast. Being on a board can be an incredibly valuable, interesting and exciting experience. It can also be lonely, challenging, and let's face it pretty hard. So here at take on board, I'll bring you weekly tips, tricks and advice to help you navigate your way onto a board onto your next board and to build your governance wisdom. Now, on with the show. Today on the Take on Board podcast, I'm speaking with Lina Patel. And we'll be exploring the differences between US and Australia not for profit boards and governance. Before we start that discussion, I'd like to acknowledge the traditional custodians of the land on which we record, the me that is the Wurundjeri people of the Kulin nation, and I acknowledge their continuing connections to land, waters and culture and pay my respects to elder's past and present. As people who listen to this podcast will know I support the Uluru statement from the Heart. I'll be voting yes in the upcoming referendum and I encourage others in the Take on Board community to do the same. Now let me introduce Lina. Lina Patel is a startup board member for Global Impact Australia, and we'll find out a bit more about that in a moment. She is a Melbourne-based facilitator and poet. Lina works with people who value positive social outcomes and want to improve how they work and her specialty is getting things done, calmly we all need a bit of leaver in our life, I think so welcome to the Take on Board podcast, Lena.

Lina Patel 1:40

Thank you, Helga, so wonderful to be here and in conversation with you.

Helga Svendsen 1:46

So in fact, Lina and I first connected, gosh, I don't even know, years ago, two years ago when I was the co chair of the Center for Sustainability leadership. And Lina was on the facilitation team there. So I love it when the little circles come back around again years later, and we get to have this conversation. But before we talk about whilst I'm really keen to talk about those differences between us and Australian, not for profit boards and governance, let's not go there quite yet. I

always like to dig a little deeper about the person I have here. So tell me, where were you born? And where did you grow up and tell me about your siblings and your family?

Lina Patel 2:25

Well, I was born in Nairobi, Kenya, in East Africa. And we emigrated our whole family emigrated to Australia when I was nine or 10 years old. And where we landed was on the traditional lands of the woody woody people in a city called Wollongong, which is on the east coast of Australia and about an hour and a half south of Sydney. So we had one auntie who was living here who who sponsored our migration, and she was in Wollongong. And so we ended up in Wollongong. And that's how I grew up in Wollongong. And it was a really delightful place to grow up. It's a small city, you're kind of geographically bounded by the Ocean to the east and the escarpment sort of sort of this mountain range or hills to the west. So very clear where the city begins and ends, beautiful beaches and amazing place as a kid. And I'm one of four, and I was the middle child for, you know, until I was 13. And then our youngest sister arrived. And so I don't know, I mean, I still really hang on to my middle child identity, even though I think technically, I'm not the middle child.

Helga Svendsen 3:40

Well, you're a middle child

Lina Patel 3:42

Yeah, it's like shared with my brother that who's only 18 months that we're very close in age only 18 months difference. And so yeah, we're like co-middle child.

Helga Svendsen 3:53

Well, actually, I've met as the youngest. He was formerly the youngest. I imagine that's even more of a transition you go from being the youngest, which, being a youngest child myself is quite frankly, an awesome place to be to be in the middle child, which in our family goes from being the youngest get away with anything in your life to being Switzerland and having to kind of manage all of the family dynamics.

Lina Patel 4:15

Well, I have a feeling my brother never really let go of being a child. So he's still got to like, operates as though he's the youngest child. And yeah, it's got its you know, it's big energy. If I'm the youngest child energy.

Helga Svendsen 4:28

I'm going to ask a stupid question here. Like you talked about Woolongong and you said that was the lands of the Dharawal people, I think, yeah. You were born in Kenya. Yeah. Is this acknowledgement of First Nations people and so on? Is that only inverted commas in colonised countries? Yeah. Right. Great. Excellent.

Lina Patel 4:46

I mean, Kenya was colonised as well. So it would be remiss of me not to mention that my peoples saw on my mother's side we are Muslims. So where, I guess would be considered the Indian diaspora in Kenya, in East Africa. And really my pupils were a colonial proxy. So even though I am led to believe our families, you know, I'm eighth generation Kenyan. But I think in our family, there are people who came across when the colony you know, the British colony came and took up residency in East Africa and largely benefited from that. So, socioeconomically, we're a minority in Kenya, but I would say, economically a majority, and that this is like 100%, connected to colonisation in East Africa. But as to whether that acknowledgement happens, like, that isn't something that I grew up with him. And also, you know, I really only, I feel like it's only something it's actually when I was doing the Center for Sustainability leadership program about 10 years ago in 2014. You know, I was in my, when I was in like my mid 30s, at the time, and I really hadn't, even up until then had to engage with things like that was the first time I did an acknowledgement of country ever.

Helga Svendsen 5:59

You say you didn't grow up with an acknowledgement of country? Neither did I. And I've lived in Australia my whole life. It was absolutely not a thing when I was young. And like you say, I think it's probably only the last maybe even five to 10 years. 10 years ago, I think it started happening. And probably over the last kind of three to five years, it's become pretty commonplace to happen. But it's definitely not something I grew up with. And I don't think most people in Australia grew up with it, either.

Lina Patel 6:29

Yeah, and what I love is that because I pay attention to where I am, in terms of whose country I'm on, so I'm, you know, as I'm speaking to you on bunurong country, I'm in the southeast, and suburbs of Melbourne, also part of the unceded lands of the Kulin nation, I begin to notice the difference between country just traveling across Melbourne, like it's very noticeable to me, going around country does feel different to Wurundjeri country to me. And I have a very, very low basic level of understanding of these things. So when I get to travel into state, it's like, wow, I'm, I'm like, on a completely different country. And that's just kind of amazing to me.

Helga Svendsen 7:10

And yeah, thanks for giving us some of that background. Actually, one thing before we get off background, you're on the Board of Global Impact Australia. That's right, tell us a little bit about that organisation.

Lina Patel 7:20

Well, it consists of the board and colleagues in the US. So I'll go back to global impact for sort of the larger organisation that we're part of based in the US. So Global Impact has been around for close to 70 years. So really well established organisation in the US, established in the mid 50s. And initially in the workplace giving space. So that was kind of their sort of initial focus. Fast forward 40 years in the mid 90s. They were, you know, in terms of the scale of the service they were providing, they were administering the US Federal Government, annual workplace giving campaign. So you can imagine kind of in terms of scale, and the sort of skill and infrastructure needed to run something like that, you know, the size of organisation, then kind of over the last kind of couple of decades, they've really sort of expanded and grown their service offering in the US. And largely, they're providing a service to the philanthropic sector in the US, workplace giving seems to be a much bigger thing in the US than it is here in Australia. And they've got all of that kind of infrastructure there in place. Global Impact Australia came about in I think it was like 2018, and very much in an idea spearheaded, and the idea has been really led by the CEO of global impact of Scott Jackson, who is a remarkable person has this incredible life story. And one of the most present CEOs I've encountered given the size of global impact. So Scott is in attendance at all of the Global Impact Australia meetings, the board meetings, and is very much led the various activities to form up Global Impact Australia, which has met largely registration type activities. So they're kind of very, like necessary, but boring administrative processes, lots of forms, registering with the ACNC, registering as a company and all the different bits and pieces to form up the company structure here. And along the way, in 2019, Global Impact merged with the I think it was Geneva global. So they were going through a big kind of merger out of the US. Things were kind of slow, because the registration process was really drawn out for us. So we were this sort of startup board for three years where we were like, I'll be on what's going on like have the forms gone in like what's the next step like coding this like really interesting bureaucratic process. Meanwhile, Global Impact also has UK and Canada operations and they sprung up and they're doing things in those regions. And then, you know, I was thinking on the timeline, and I thought, I think it was 2022, when the Australian board members like we renewed our vows, and we're committed to another, you know, a further three years together, even then it's such a lovely way of putting it. I remember like, it'll been a slow three years, but, you know, we've got our registration in place. Like, I feel like the next three years, we're going to be more building out the business. And so what global impact Australia what our focus is, and we've been working on this kind of working out our nation, Australia for the last few months, really around connecting local change making work that's happening with global philanthropy. So really providing a way for local communities who are working on global issues to access global philanthropy, and then providing those ways in which this money can move, remain on the right side of the law, again, into local projects, but bringing that global money in.

Helga Svendsen 10:59

Now finally, turning to our topic for today, you did some research around the differences between us and Australian not for profit boards and governance. Tell us a bit about what that research was and what you found.

Lina Patel 11:12

Yes, so where my interest in this started was, you know, we're at the point where we had, you know, as I mentioned, renewed our vows, we knew we were going to be serving another three years together. And I just want to give a shout out to my the other board members. So we've got Scott Jackson as the CEO of global impact, who is in attendance and participates in all our board meetings. The chair of our board, David Impey, CEO of the Enterprise Foundation at Bendigo Bank, so he brings us real wealth of that sort of foundation experience. Dr. C, Francis is a managing director and DGB and really like caeer fundraising person. So again, people with like this fundraising and philanthropic sector experience, Phil Volkanovski, does consulting in governance and culture, and then Jason Hannum, who is a Aussie in the US, who was the person who actually pulled this board together. So Jason has, again had decades of experience working with nonprofits, both in Australia and the US, as a consultant. And largely speaking, he has worked as an interim CFO, and so has been really inside some like very large nonprofits and philanthropies and seeing the workings of these organisations from that sort of CFO level. And Jason, as a trusted adviser to Scott recommended all of us in so the topic was really Jason's pet topic. And all these years, we're thinking about these differences between the way boards off not for profits in Australia, govern differently to boards of not for profits in the US. I mean, it's like it's such a niche set of things like, yeah, how does that happen? And then what are the implications for what becomes possible through the not for profit sector, and really looking at the role that boards and board governance plays in the impact that organisations have. So ultimately, what my interest is, in this is, well, I'm a collaboration designer, as well. And so I'm really, really interested in how people work together. And here I was on a new team and a team that I hadn't chosen to join, but I absolutely am so delighted and love being part of. And I know that one of the things that teams become undone over is cultural differences. So early enough in our working relationship with the US management team, and we're an Australian board, we're early enough in our working relationship, that it might be useful to talk about the ways in which our worlds are very different. So what the management team in the US might expect from us and how they operate. I was already noticing differences like nothing major. But for example, I noticed that Scott and his team in the US were very involved in this registration process, the Australian registration process, and my expectation was like, that's why we're here. Like, we should be able to take that on, even though we're not like, paid roles in the board. And the balance of labor was I was kind of like, This is too easy. You hardly have to do anything. And and I think it we were all very tentative and new to this and working out the working relationship. So that was one of the first things that kind of tipped me off like, Oh, I wonder if they know that. They could actually ask more of us or I wonder what it is that they see their role as, as management versus us as the board. And then I think just trying to unfold that question. It was like, oh, there are cultural differences, like the way boards operate in the US. pretty different to the way courts operate in Australia for not for profits. And so as a

professional facilitator, I also felt like the contribution I could make to my colleagues not having anywhere near the kind of philanthropy fundraising know how it was also thinking about, like, what is a strength that I bring, I'm pretty good at helping people work through complexity to arrive at new shared understanding. So that was also something I really wanted to offer to my other board colleagues. So we made a workshop, we made this interactive workshop, it was really beautiful. We spent three months very, very slowly unfolding, what aspect of the differences would be useful and constructive? To highlight? So Jason and I had a really, really, we were very clear that we didn't want to set up an us and them dynamic, like what we wanted to do was explore the strengths. So yes, there are differences. But we didn't want to kind of, in any sort of way end up in a world. They don't know what they're doing, or there's reasons why these differences exist. And we really wanted to surface them and have them in discussion from a strengths based perspective. I don't know if that answered your question.

Helga Svendsen 16:19

But it's interesting, you know, I'd started this conversation thinking that it'd be interesting to know what those differences were. But what I'm hearing is that you and this board, you've spent time in exploring what those differences are. So there's actually lessons. Yes, there are some differences. Yes, it would be interesting to hear what those are. But in fact, this is a story about getting boards, almost on the same page, when there's different cultures involved. What are those different cultures might be? They might be from different countries, they might be from different backgrounds, they might be just just inverted commas from different ways of working. But this is actually how do we all just get on the same page, so that we know what we're doing?

Lina Patel 17:00

Yeah, it was a bit of a Trojan horse, I don't think there would have come to a workshop on let's, you know, well, I'm sure they would have been open to it. But we really needed to put content that was very pertinent to how we work together. And I was reflecting on this, because I mean, I do have six points, I will share. And these are the six points that Jason has discovered in his 15 to 20 years of thinking about this, very thankful to Jason for sort of summarizing these six points. And when I was looking back at the workshop we ran, okay, so the six points took up 15 minutes of I think we did a 60 or 90 minute workshop. So content wise, I mean, we could have sent that in an email, right? But actually, now this is very much the like, revealing my bias, I don't know how you as a group navigate and explore difference. Without giving it a little bit of room and a bit of space with there was pre reading, I had the pre meeting with pretty much all I think I met with all of the board members in my pre meeting, you know, under the guise of checking the design, but really, I just wanted to, I hadn't really connected with the other board members. So these incredible chats I had with each of the board members about how they saw this particular issue, what they were worried about, I would encourage any person who's like maybe even new to a board, just invent a workshop, and go through the design process with hopefully one other board member we met, I think it was once a week, or once a fortnight for three months of this luxurious process with Jason unpacking these things. And I feel like we landed a really sharp experience that led to some very, very helpful things

nobody really wanted to mention, like we're never going to pay to be on this board, as Australian board members is, you know, one of the differences I feel most people might know about is like we don't have pay to play on not for profit boards. There were other things there. But I feel like find a reason to run a workshop. And then it gives you an excuse to have a little chat to everyone out of session. And then you get to have this experience that hopefully unlocked something new, like in your togetherness,

Helga Svendsen 19:17

Oh my God, it is such a it's such a proactive way of looking at your induction in a way as well as like, Oh, I'm new on this board. How can I get to know each other? Often directors I think and in fact, I've thought about it in this way. This is opening my eyes to new ways of doing things. You'll often wait for, oh, I'm the new person, they'll organize this meeting. They'll organize that many. You don't need to wait folks. In fact, I've definitely done that I've reached out to new people or as the new person reached out but induction doesn't have to be a reactive process. It can be a proactive process and I love it. Find a workshop find a point that you want to have a conversation about Yeah,

Lina Patel 19:53

I did have a genuine curiosity and what it was was it started with me kind of being like, Hey, Jason had stuff work in that, you know, you've been working in the US for a while we met back in 2009, or 2010. We both worked at NAB for a year on on a transformation program together, and then stayed in touch over the years. And so I knew he was somebody, I could just, like, ask those very naive questions and not feel. Yeah, the stupid questions. And so I was like, I know there's a difference. I'm sure you've noticed a difference? Could you help me understand? And then as we went on, I was like, Oh, you're like, really into this? Like, you're like, really into this topic? Well, I would love to learn, I would love all of us to learn together, because I'm just that way inclined. As a facilitator, I'm pretty good at the workshop thing. So let me bring that to this. Put some, you know, the frame around it. And yeah, we just had such a fun time putting it together. I really enjoyed the session where we've got snippets off the recordings, I was looking back over and I went, Oh, that was a good workshop. That was a good discussion.

Helga Svendsen 21:01

Amazing, and I even love your question in there. Could you help me understand, even in board meetings, or learning about the other people that you have around you? It's such a beautiful question. All right, I have to ask about the six things. Yes. Tell me about the six things. What did you what? Okay, what did you find?

Lina Patel 21:19

The six things according to my mate Jace. So yes, again, all credit to Jason Hannum for these.

Number one board size. Broadly speaking, in the US, it's not unusual for a board to have 12+, so we're talking not for profit here. So not for profit context. It's not unusual for a board to be 12+, whereas in Australia, you'd be hard pressed to find anything bigger than 10. Right. So it's generally less than 10. And the Global Impact Australia board, we've got 1234, there's five of us and Scott. So number one, board size.

Number two, meeting regularity in the US, three, max four meetings a year. Whereas in Australia, it would be unusual to have less than six. Some nonprofits do meet monthly and depending on what's going on for the organisation. So yeah, it would be really unusual for there be six, you know, less than six. Whereas in the US, it's like four is like getting to the top end of how many meetings.

Number three, the director role in fundraising. So I hinted at this before, it might be the, you know, quite commonly known. But in case it's not in the US, there is an expectation that directors of nonprofit boards, make personal contributions. And in Australia, personal contributions are quite rare. They're welcome. But they're quite rare. So a couple of things around that. So there's a few phrases which came up were a 'pay to play'. So where there is a minimum amount, as a US board member that you are donating, like you are buying your board seat, in a sense. And the other way I heard it, put, and this was from Anita Whitehead, who's the Chair of the Global Impact US board, and I also leads the KPMG foundation and corporate citizenship service in KPMG. Us. And neither was I was telling us another way that this is framed is 'give or get'. So you've got as a US board member at target, and you either give it from your money or you fundraise it. And we're talking about amounts like \$10k - 50k per year per board member. And an interesting thing that came up during the session, which I was like, wow, that is very different. Scott was mentioning that within the US. So remembering that global impact is serving charity partners. So they're very much in this space. Operationally. It's considered best practice, or how did he put it. Funders actually look for 100% Director funded, like, so if you're not 100%, directed, funded, then that counts against you. And that that is like just blows my mind. 100% Director funded.

Helga Svendsen 24:04

I imagined for the Americans listening to this, they're just like, yeah, and for the Australians listening like you and I were just like, wow, that is so foreign.

Lina Patel 24:12

It's a so far in concept. You can see how, if you're looking for like, large proportion of your funding to come from directors, you can see how that has that result in larger board sizes. Right. So the more people you have, the more fundraising avenues you have. There's also implication there for the culture and the motivation. So in Australia, because we're not paying to participate, there's different motivations as to why one might want to be a board member, one might one might want to serve on a board. One thing that you know, in terms of motivation, so for your large enough for profit, so in the US kind of more prestigious organisations. There's visibility and network, right. So if there is prestige involved with that, and I'm sure there's prestige in the you know, in particular, not for profits in Australia, you know, it's certainly not for how much you're paying to participate, right, there's just a different place from which that prestige comes from. Yeah. And so a larger board gives you an increased fundraising base. Now, I mean, obvious but worth mentioning. If you need to pay to be on a board, you can imagine what the implications are for Equity and Diversity. Right?

Helga Svendsen 25:25

I'm so glad you went there, I kind of money. I made a note here before diversity. Interesting.

Lina Patel 25:31

Yeah, when looking at the makeup of boards, I think, if you didn't know these differences, it just might not be clear to you why the makeup of boards is different, or how people conduct themselves is different, right, like the difference between me having put forward \$50,000 to be on this board versus little old me self employed, independent facilitator, you know, dreaming up workshops, very, very different way in which we will be showing up in our roles. And so both of these have strengths. And so, you know, we kind of got to really speak directly to that, like, what are the strengths will, when you are making personal contributions, like you are really backing that organisation, right, the directors are like, bought into in quite a different way, because you are bankrolling that not for profit. So in a way, you kind of really got to believe in the thing. And again, not to say that, if that's absent, you don't believe in the thing. But yeah, it just, it just brings in a different sort of sense of commitment for a particular cause. Okay, so both sides meeting regularity director role in fundraising.

Number four, formality. So I had never heard of the Robert's Rules of Order. I heard about them for the first time, a year ago when we were designing this workshop. And I looked them up. And it's a real kind of parliamentary approach to meetings. So US board meetings generally follow the Robert's Rules of Order. Whereas the way meetings are conducted in Australia are not consistently formal. So there is a structure to them. It's not that they're informal. But it's not like you could go to any board meeting and it would be run the same, or have that same pattern. So as a facilitator, I found that really fascinating. It's like, Ah, I was chatting with actually someone we both know, Laura Hamilton-O'Hare who was a nother colleague of ours at Center for Sustainability leadership, and is now the

CEO of living Futures Institute, Australia. And they operate in the same thing with as a US, you know, counterparts in Australia. And we discovered, we're governance geeks, and my chats with her in the leader, she was saying how there is such a difference in tone. So the Australian Border, very playful and joke around. And that can be quite shocking to the US colleagues as to how friendly banter. So that's just a small thing. And so when we unpacked this, I noticed our board meetings were a bit more mindful and will signal to our US colleagues that, okay, in Australia, we have this term of endearment or when we're like making jokes on the board meetings, we're a little bit more sensitive to not being too irreverent, and actually just letting our US colleagues know that we're whatever. And it's nothing major, but it's a difference.

Helga Svendsen 28:35

Yeah. And be mindful of it. It's so yeah, he's interesting. I'm going to look up the Robert's Rules of Order to Robert's Rules of Order yet again, we'll put a link to it in the show notes, if people want to have a look at it. Yes.

Lina Patel 28:47

Number five, skills mix. So in the US where you have, so we're paying to be on the board, or there's a fundraising requirement from directors, we've then got bigger boards. So what happens is with the skills mix, is that there tends to be this thing in the US where depending on what the not for profit does, you're going to have a lot of people from that sector. So if it's an education related organisation, you're going to have a lot of educators on there. If it's a health thing, you're going to have a little bit health professionals. Whereas in Australia, we have more of a governance or operation competency. So you know, you've kind of got your classic skills matrix. Some of these guys are very experienced in philanthropy and fundraising. But there's also that need for like someone who's across risk and across finance and cross legal and I guess then fundraising because that's a particular operational area. So the competency based recruitment or you've probably got better words for this.

Helga Svendsen 29:50

It's a skills based board in a way and meaning that skills matrix and at least here in Australia, often the skills matrix is based around industry skill. Switch might be you're educated to help people and so on. And other technical skills and governance skills and the attributes that are needed in the boardroom.

Lina Patel 30:09

Yeah, so I get the feeling the attributes bit may not be as much of a priority. And the skills for us not for profits may tend more towards sector domain skill interest as opposed to technical skill. And the

thing that came up in our discussion last year was that, in the last 10 years, there's sort of more diversity on boards. And I'm not sure what the kind of cultural imperative has been in the US that's driving that. And so yeah, there's a bit more diversity on on boards, and that might be in the in the skill space.

And the last one, number six, risk management and compliance. So broadly speaking, Australian boards have more of a focus and an interest, more airtime is taken up on risk management and compliance. There's more like little board processes when you're setting up a board and the board responsibilities. Yeah, Australian boards tend to focus more on that, then us boards might. And I think where we got to with that is that that is maybe more held by management. So in the US that risk management and compliance is a much more management, organisational level thing, whereas, yeah, I mean, that the first thing I think about in terms of governance is risk management. So it's just really interesting. It's like, Wow, isn't that why you why you have a board

Helga Svendsen 31:36

Oh, that is so interesting. And it's, you know, again, I'm an Australian director, I mostly speak to Australian directors. So some of it sounds quite literally foreign. You know, often if I'm speaking to for purpose boards, upfront, I'll say, I'm not a fan of the pay to play rules, or the guidelines or whatever. Like, I think it really limits who you're having your boardroom. And it impacts those other things, like the skills that you will get in the boardroom, like the diversity you would get in the boardroom and quite possibly the, I would say the responsibilities that directors have around risk and compliance, as well as all of the other things. So it feels like they kind of go together in a way and possibly even the number of meetings as well. And as you've already said, the number of directors. And it's interesting, I just wonder why if I was talking to an Australian board, and they're like, Oh, we want to put some of this stuff in place. I often say to them, ambassadors, like have an ambassador program or something along those lines, if people want to give to the organisation, that's awesome. And you want to engage them, but they don't need to be in the boardroom, because being in the boardroom comes with directors responsibilities, and they're going to need to do that sort of stuff. So are there other ways of doing it? So yeah, that is so interesting.

Lina Patel 32:45

Yeah. And just to say, these points all have a whole heap of data behind them, there's a whole heap of kind of research that, and Jason's kind of 15 to 20 years experience working in the sector in these two places. And part of that workshop, we did this very light literature review, where Jason and I kind of went and found, you know, he had a bunch of stuff in his library. And I went and found a bunch of stuff, because essentially, it was going to be reading I was going to, I felt I had to do anyway, we kind of pretty much just made the whole board do the reading, we found some fantastic articles, which I'm happy to share and link to in the in the show notes around just some like really, really great bits of research, specifically to the not for profit sector, which more or less explain why those mechanisms make sense, like why they are fit for purpose. So, you know, then that was the

thing we really adamant around taking a strengths based approach and saying, Okay, well, there just are differences. There's a whole heap of kind of cultural and historical reasons why these differences exist. How do we work with those differences? And how do we like there's going to be times when you're going to expect us to operate in a different way to that we're accustomed to, let's at least know why that might be the case. Like why you might get pushback from us. So this is between the management team and the board, why we might think we should be doing something. So yeah, I'm happy to share those articles that just really opened my eyes to Oh, yeah, that completely makes sense.

Helga Svendsen 34:17

Oh, later, Lina I feel like we've had two stories here in a way one is about your journey of joining the board and understanding the board and one is about the lessons that were learned from that kind of research, I guess. What are the main points you want people to take away from the conversation that we've had today?

Lina Patel 34:33

So key takeaway would be firstly, if you're on a specifically on a Australian based not for profit, this might be also applicable to for profits. But I think especially if you're in an Australian not for profit, that has a connection to or works with US counterparts. Be aware that there are major differences in the not for profit governance and board roles. And those six different Here's firstly, you're going to encounter different board size. Secondly, meeting regularity is going to be different. Thirdly, directors have a very different roles in fundraising. Fourth, there's going to be different levels of formality and how the actual meetings are conducted. Fifth skills mix will be different. And what is prioritized in these two different locations will be different. And lastly, the board's will have different levels of focus on risk management and compliance. So my first takeaway, a second takeaway, regardless of whether you're working across different jurisdictions, they will may be cultural differences that exist on your board and a board. In the end, it is a team, right? You're not just like a random group of people who sometimes meet and make decisions. You're a team that plays a very important role in the running of that organisation and in guiding and supporting the organisation that you're there to service off, I really encourage you to take the time to explore what those cultural differences might be, and how it might press upon the way you work as a team. And what it is that might be points of tension for you as a as a cross cultural team.

Helga Svendsen 36:13

And I mean, we've talked about resources already. But is there is there any other resources, maybe I'll put it that way any other resources you would like to share with the Take on Board community.

Lina Patel 36:23

So the two that I found really beneficial around this kind of us Australia difference was there's a 2021 report called leading with intent. And it's a report on us not for profit board composition, practices, performance and culture. And that particular report was based on responses and feedback from not for profit CEOs and board chairs in the US. And it's a hefty read. But the start off each chapter has a beautiful summary of the major points in that chapter. So you can just kind of skim the first part of each chapter. And that's called leading with intent. There may be one for 2023, I'm not sure. But when we were working on this, the 2021 was the most recent one. And then if you're curious about the strengths of the Australian, not for profit governance context, so we've provided reading for both sides, if that makes sense, I highly recommend the AICD. So the Australian Institute of company directors, not for profit governance principles. So again, sort of a hefty document for the first 10 pages of that NFP Governance Principles Document, the first 10 pages provides really right outline of the principles. And if you stick those two documents side by side, you will learn a lot about the strengths.

Helga Svendsen 37:36

Oh, that is fantastic. Lena, thank you. There is so much in there. Like I say I feel like we've got two episodes for the price of one there. One about Proactiv induction into the boardroom and ways of making those connections and secondly, about some of the lessons that you learned from that process. So thank you so much for being open to sharing some of that wisdom with the Take on Board community today. I really appreciate it. And I know, the community will take a lot from it as well. So thank you.

Lina Patel 38:03

Thanks, Helga. And if anyone would like this discussion with their board members, I would love to support them with that. I think it's really important. So thank you, and thank you, Hellyer for bringing these conversations. All of that I've been so enjoying working my way through the back catalogue. It's been an absolute delight knowing there's like a governance geek out Melbourne based, you know, podcast, what a treat how lucky are we

Helga Svendsen 38:28

I was thinking before, you said Laura, and you share the governance geek, Center for Sustainability leadership, alumni governance geeks, that's a little subset of it. Love it. Awesome. Thanks later. Thank you.

So that's a wrap for the Take on Board podcast today. Thank you so much for being here and being part of the Take on Board community. I do this podcast because I love bringing good women and

gender diverse people together. So I invite you to join us over on the Take on Board Facebook group, an active group that helps supports and cheer squads each other. Just search Take on Board and Facebook to find us. I'd also really love it if you could do some of the other well podcast things. Share the podcast with someone you know who might get some value from our discussions. Subscribe if you haven't already. And well. I also really love it when people write and review. Thanks again for being part of the Take on Board community. Now go and put these tips, tricks and advice into action. So you can be your best in the boardroom.

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