

# BETTER TOGETHER

**How Top Nonprofit CEOs  
and Board Chairs  
Get Happy, Fall in Love  
and Change Their World**

**THE COMPANION WORKBOOK**



**JOHN M. FULWIDER, PH.D.**

# Better Together: The Companion Workbook

John M. Fulwider, Ph.D.

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*For Jami, Lillian, and Lucille*

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# Praise for *Better Together*

Every nonprofit organization dreams of a strong partnership between its board chair and executive leader to help ensure its success. Unfortunately, this essential relationship is often left to chance. By providing concrete action steps and useful case studies, *Better Together* is an invaluable how-to resource for making dreams a reality.

**Emmett Carson, Ph.D.**

CEO and President, Silicon Valley Community Foundation

After merging with another nonprofit, I was looking for a guide to help me work with a new board chair and a whole new board. *Better Together* was exactly that. It gave me concrete building blocks with which to build a strong, mission-focused relationship.

**Ines Polonius**

CEO, Communities Unlimited

The relationship between the chief elected officer and the chief staff officer is the most important relationship in the governance of a non-profit organization. John Fulwider takes a lighthearted but instructive approach to building and sustaining those relationships.

**John H. Graham IV, FASAE, CAE**

President & CEO, American Society of Association Executives

Board chair-CEO relationships can be messy. John Fulwider provides simple solutions to guide these two leaders toward “thriving, not just surviving.” These commonsense principles can help nonprofits position themselves for much greater impact.

**Liz Darling**

CEO, OneStar Foundation; Chairwoman, Camp Fire National Board of Trustees

John Fulwider’s *Better Together* makes important contributions to the conversation about and practice of nonprofit board leadership. The insights about what it takes to create a productive and mutually fulfilling board chair/CEO partnership will inspire and guide nonprofit leaders who want to take their relationship to the next level of effectiveness. Equally important is the opportunity to hear these lessons from the chair/CEO pairs themselves via John’s interviews.

**Debra Beck, Ed.D.**

Nonprofit Governance Expert and Author, Laramie Board Learning Project

*Better Together* reinforces and expands upon what I found in my study of board chairs and executive director relationships: It’s personal and it really matters.

**Mary Hiland, Ph.D.**

Nonprofit Governance Expert and Author, Hiland & Associates

Fulwider may be telling a love story, but it’s no fairy tale. We were able to preview the book, and can attest that it is chock-full of vignettes, case studies, and real-life examples of what healthy CEO/Board Chair relationships look like and how to foster them. This resource is rooted in

Fulwider's belief in the transformative potential of these "leadership partnerships" to help nonprofits to achieve their missions. And it is eminently practical, as exemplified by the three keys he describes for taking your CEO/Board Chair relationship from surviving to thriving.

**La Piana Consulting**



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- Jan Bretz, my speaking coach.

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- Ingrid Kirst and David Smith at Community CROPS
- Judy Stafford and Bev Suderman at Cowichan Green Community
- Fred Bartenstein, former CEO of The Dayton Foundation
- Mike Parks and Ellen Ireland at The Dayton Foundation
- Nola Derby-Bennett and Zachary Baehr at The HUB - Central Access Point for Young Adults
- John Chapo and Ginny Martin at Lincoln Children's Zoo
- Carleen Rhodes at Minnesota Philanthropy Partners
- Mike Renken and Skip Hove at NeighborWorks Lincoln
- Andrew Swinney at The Philadelphia Foundation
- Nancy Straw at West Central Initiative

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- Deane Finnegan, who provided early inspiration and encouragement and helped me organize and facilitate an early workshop to test these ideas.
- Matt Schulte, who invited me to present the almost-finished book to his group of nonprofit chief executives.
- Carleen Rhodes, who gave me a chance to present my work at the Larger Community Foundations Conference.
- Amy Daly-Donovan, who connected me with Mike Parks and Ellen Ireland of The Dayton Foundation.
- Those who attended an early workshop Deane Finnegan and I put together to test these ideas: Ingrid Kirst, Julie Smith, David Smith, Mary Bruning, Jennifer Brinkman. Special thanks to Deb Weber for hosting.

**Those who came before me:**

This book is packed to the gills with ideas that are mostly not my own. I've taken bits and pieces of other people's ideas and tried to synthesize them into a set of ideas helpful for nonprofit chief executives and board chairs.

I stand on the shoulders of giants.

Where I can remember the source of an idea, I've tried hard to cite it. I've doubtless repeatedly missed the boat here.

If you think I should add a credit or source, please tell me at [john@johnfulwider.com](mailto:john@johnfulwider.com), or on Twitter: @johnmfulwider. It is crazy easy for me to update this book thanks to the good folks at [Leanpub](http://www.leanpub.com)<sup>1</sup>. So don't hesitate to write.

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<sup>1</sup><http://www.leanpub.com>

# 1. Introduction

*Better Together: How Top Nonprofit CEOs and Board Chairs Get Happy, Fall in Love, and Change Their World* answers the “why” and “what” questions about nonprofit chief executive-board chair partnerships: Why do they matter, and what can I do about them?

This *Companion Workbook* answers the “how” questions raised by the main book: How do I improve my own leadership partnership, or help others to do the same?

As you know from reading *Better Together*, the chief executive-board chair leadership pair drives a nonprofit’s success—or not. When their working relationship is good, both parties are free to lead their colleagues toward mission impact and enjoy their work. When it is poor, progress stagnates as the chief executive waits for relief and the board chair casts about ineffectively.

Building a leadership partnership that makes you happy, makes your partner happy, and changes the world comes down to just three keys:

1. Build transparency and trust
2. Set clear expectations
3. Plan frequent communication

It really is that simple. But here’s the truth: Like most tried and true principles, these three keys are easy to understand and hard to put into practice. Most people don’t put in the work. They coast. They wing it. They assume everything’s going to be all right. And the legions of unhappy chief executives and board chairs and unfulfilled nonprofit missions stand as witness to their lack of intention.

You, dear reader, must be different. You owe it to the mission. You owe it to the people you serve. You owe it to yourselves.

You can be different, with this workbook by your side.

The *Companion Workbook*’s built around powerful questions you can use with your executive coach, with your leadership partner, or by yourself to assess your leadership partnership and make plans to improve it.

It contains:

- **Assessment questions and exercises** to perfect your application of the three keys to a healthy partnership: 1) Trust and Transparency; 2) Clear Expectations; and 3) Frequent Communication.

- **Conversation Calendar:** A year's worth of prompts for weekly chief executive-board chair conversations, on 24 critical strategic topics. These questions allow for necessary tactical-level, day-to-day support and mentoring while reserving the balance of your time together for meaty strategic topics.
- **Partnership Plans:** Plans for rescuing a flagging partnership, making a good partnership great, and replicating a transformational partnership by spreading the love inside and outside your organization.
- **Training Outlines:** Suggestions for group trainings capacity builders can use to teach people how to form healthy and transformational leadership partnerships. You can freely adapt them to your own use.

## Who This Workbook's For

I wrote this workbook for growth-oriented nonprofit chief executives and board chairs who are good, on the way to great, or great, on the way to world-class.

There's something in this workbook for you no matter where you're at.

- If you're in a poor relationship, there's hope and a path forward.
- If you're in a healthy partnership and want more happiness and more results for the mission, you can take your partnership from good to great.
- If you're in a transformational partnership, I've got a simple model you can share with others to increase their capacity to change the world.

Most partnerships are in the middle. Moving up means more happiness and mission impact for both the chief executive and board chair.

Chief executives, this book shows you practical ways to improve the key relationship for your organization's mission impact and your job satisfaction. Even the most competent, successful chief executives can stand to improve solid board stewardship practices.

Board chairs, you can use this as a guide for accomplishing your agenda. You feel a sense of responsibility and pressure to leave the organization better than you found it. If you're determined to make a difference as board chair, yet understandably a bit anxious about how that's going to happen, this is the book for you.

You must be courageous. You'll ask hard questions of yourself and others in the chapters ahead. You'll need to change, and inspire others to do the same.

I know you can do it, because you've already believed *Better Together's* message: that the chief executive-board chair partnership is the most important factor in a nonprofit's success. You know changing the world really is better together.

Onward!

## How to Use This Workbook

This is a book of questions, not answers. It's prefaced on the assumption that you have the answers inside your head, or can easily go ask someone for the answers, once you know the right question.

This is what executive coaches like me do: We ask powerful questions that unearth the answers in your head and in the heads of people you go to for help.

There are two groups of questions in this workbook:

1. Those you reflect on mainly for your own benefit.
2. Those you discuss with your leadership partner.

You can use the self-reflection questions with:

- An executive coach;<sup>1</sup>
- A peer executive in a mastermind or mentoring group;
- A friend;
- Or, failing all of the above, yourself.

Most people find self-guided reflection difficult for three reasons.

1. It's hard to pay attention to your own thoughts when you're thinking about yourself and have no external force keeping you from getting distracted and going off on tangents.
2. You're biased. You'll tend not to ask yourself the next question (e.g. That's interesting. Why do you suppose that is?) because your biased mind will say to itself, "Good job, mind. What a thorough answer to that question. Nothing left to examine here!"
3. We humans are cognitive misers. We tend to use mental shortcuts to make judgments and decisions.

Conversation partners like executive coaches and peer executives in mastermind and mentoring groups give you the best return on your self-reflection investment. That's because they know the greatest value in going through reflection questions is in asking the *next* question: The one that really digs into the deep why underneath your answer to the first question, and reveals powerful ideas that were in your head all along.

For all these reasons, you'll find going over these questions works better with a conversation partner like an executive coach or a peer executive. Self-examination is Better Together.

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<sup>1</sup>Unfamiliar with how executive coaching works for nonprofit executives, and who funds it? Don't worry about that; while executive coaching's been a proven results-getter and value driver in the private sector since the 1980s, it's still "new" to nonprofits. Your best starting point is the report *Coaching and Philanthropy: An Action Guide for Grantmakers*, written by Grantmakers for Effective Organizations and CompassPoint Nonprofit Services, with funding from W.K. Kellogg Foundation, The Harnisch Foundation, The James Irvine Foundation, the David and Lucile Packard Foundation, and the Evelyn and Walter Haas, Jr. Fund. After that, there's an overflowing cornucopia of resources online at the [Coaching & Philanthropy Project Online Community](#).

## 2. Quick Win Partnership Plans

“Stop!” you may be saying (hopefully not shouting, that could get embarrassing). “I’m convinced, and I need to do something—right now!”

This chapter’s for you. Without reading onward, here are five plans you can start putting into action now, without reading the whole workbook.

### Improve a Poor or OK Relationship

Here are the steps for this partnership plan:

1. Renew your own commitment to the mission. Use the “Start with Why” questions in Chapter 3.
2. Resolve any interpersonal conflicts, starting with these questions:
  1. How willing are you to see this conflict resolved?
  2. What are you willing to give up to resolve the conflict (e.g. being right, looking good, being self-righteous, staying invulnerable)?
  3. How much responsibility are you willing to take for the conflict?
  4. What would the other person say about the conflict?
3. Commit to the Three Keys. Start by establishing regular communication, using the “Exercise: Set Up the Meetings” in Chapter 4 and the Conversation Starters in chapters 5-7.

## Jumpstart a New Partnership

This is for partnerships you think in advance will be good, great, or transformational.

1. Prepare individually ahead of time:
  1. Take a thinking styles or personality assessment. Pick one from the list in “Exercise: Shared Language” in Chapter 4.
  2. Write out a brief “owner’s manual” about yourself, containing preferences and pet peeves about working relationships. (Use the instructions in “Exercise: Owner’s Manual” in Chapter 4.)
2. Plan two hours with your leadership partner to:
  1. Discuss your assessment results and owners’ manuals.
  2. Determine each other’s communication must-haves.
  3. Get weekly conversations scheduled on your calendars. (Use the “Exercise: Set Up the Meetings” in Chapter 4 and the Conversation Starters in chapters 5-7.)

## Make a Good Partnership Great

1. Choose a transformative project the two of you will accomplish during the board chair's term.  
The project should:
  1. Require both of you to grow as leaders.
  2. Be accomplishable only when you put your different, but complementary, talents to use.
2. Complete the project by the deadline. (No term-extension cheating allowed!)

**Hint:** Just looking through the Conversation Starters in chapters 5-7 should help you narrow in on an area of focus.



## Accomplishment Agenda

This plan can work in any situation, so long as:

1. The shared mission and vision prerequisite is met. (See “Shared Mission and Vision” in Chapter 4.)
2. The growth mindset and abundance thinking prerequisite is met. (See “Growth Mindset and Abundance Thinking” in Chapter 4.)
3. There’s a basic level of trust. (See “Key 1: Trust and Transparency” in Chapter 4.)

Follow these steps:

1. Ask your partner, “What are two or three challenges and opportunities coming up for the organization in the next year?”
2. Ask your partner, “What do these challenges and opportunities require of the board chair?”
3. Ask your partner, “What do these challenges and opportunities require of the chief executive?”
4. Ask your partner, “What are challenges we could work on together in the next year?”
5. Ask your partner, “What are opportunities we could seize together in the next year?”
6. Chief executive, ask your board chair: “What do *you* want to accomplish in the next year to feel the year’s been a success *for you*?” (Emphasize the italicized words.)
7. Chief executive, ask your board chair: “How can I help?”
8. Board chair, ask your chief executive: “What do *you* want to accomplish in the next year to feel the year’s been a success *for you*?” (Emphasize the italicized words.)
9. Board chair, ask your chief executive: “How can I help?”
10. Ask each other, “What information, and how much of it, does each of us need to work together on what we’ve identified?”
11. Ask each other, “How will we measure success in the project(s) we’ve chosen?”
12. Ask each other, “How will we measure success in our working relationship?”
13. Ask each other, “What’s a quick win we can get to show results and keep our motivation up?”
14. First person to ask this wins a free tasty beverage from the slower party: “When and how are we going to get started on this?”

## Go It Alone, Initially

If selecting from one of the Quick Win Partnership Plans above doesn't appeal, try this alternate plan and its reflection questions.

1. A better leadership partnership: What's in it for you?
2. A better leadership partnership: What's in it for your partner?
3. A better leadership partnership: What's in it for the people you serve?
4. What are your assets here? What's already going right?
5. What's the biggest challenge?
6. What One Thing can you do that will make everything else easier, or even unnecessary?<sup>1</sup>

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<sup>1</sup>As you might gather from my capitalizing "One Thing," this question's inspired by *The ONE Thing: The Surprisingly Simple Truth Behind Extraordinary Results* by Gary Keller and Jay Papasan.

## 3. Start with Assessment and Understanding

People do things for their own reasons. Building a leadership partnership is an inspiration campaign that begins with understanding your own motivations. When you're clear on your own motivation—your deep why—you'll be able to inspire others, including your leadership partner. So ...

### Start with Why

1. What is your “why”: your deepest, most personally meaningful reason for pursuing the mission?
2. Why do you want that? (Repeat this question at least three times. Trust me.)
3. What's your personal story about how the mission affects you?
4. If the mission failed, how would that affect you, personally?
5. What else could you be doing with your life?
6. Why have you prioritized the mission over those other things?

### What's in It for You?

Building a healthy leadership partnership is hard work. What's in it for you? What's going to keep you motivated and pushing forward when things get difficult—which they will?

1. How would your job satisfaction improve with a better partnership?
2. What would need to change?
3. What would a healthy partnership look like for you?
4. If I were to send a third-grader to your office with a checklist after instructing her or him to look for signs of a healthy partnership, what would be on the checklist? (Hint: Stick with easily observed behaviors. This is a third-grader, and not a psychic.)
5. What would a healthy partnership make possible for:
  - You, personally?
  - Your life partner?
  - Special younger people in your life?
  - Close family members?
  - Your closest friends?
6. What would a healthy partnership make possible for:

- The organization?
- The mission?
- The board?
- The staff?
- The people you serve?

## Deeply Understand Your Partner



The greatest ability in business is to get along with others and to influence their actions.—John Hancock, merchant, smuggler, statesman

(This is going to look identical to what you read earlier in this chapter, but it's actually expanded. Bear with me and read carefully.)

People do things for their own reasons. Building a leadership partnership is an inspiration campaign that begins with understanding your own motivations *and continues with understanding your partner's so you can have conversations about how your motivations match.*

When you're clear on your own motivation—your deep why—*and that of your partner*, you'll be able to inspire *your leadership partner to walk shoulder to shoulder with you toward a goal that means the world to both of you.*

Since there's another person involved and this is a business relationship formed to produce results, you'll need to know your own success measures and critical needs, as well as your partner's, to succeed. So ...

## Start with Why

Reminding yourself why you want to get results can help you understand why the other person wants results—and how much each of you needs to move to meet in the middle.

1. What is your “why”: your deepest, most personally meaningful reason for pursuing the mission?
2. What is her/his “why”: her/his deepest, most personally meaningful reason for pursuing the mission?
3. What are areas of obvious agreement in the above?
4. What are areas of obvious disagreement in the above?
5. What opportunities do you see to take 100 percent of the responsibility for the relationship, or “be the change you want to see in the world”?
6. What other questions belong here? How would you answer them?
7. What insights have you had, if any, as you've answered these questions?
8. What's your next step?

## Success Measures

Business relationships are about results.

1. How do you measure success?
2. How does she/he measure success?
3. What are areas of obvious agreement in the above?
4. What are areas of obvious disagreement in the above?
5. What opportunities do you see to take 100 percent of the responsibility for the relationship, or “be the change you want to see in the world”?
6. What other questions belong here? How would you answer them?
7. What insights have you had, if any, as you’ve answered these questions?
8. What’s your next step?

## Needs—Yours and Theirs

You have needs. Your leadership partner has needs. Find a way to align them.

1. What is critically important to you? What must you have?
2. What is critically important to her/him? What must she/he have?
3. What are you ambivalent about? What could you take or leave?
4. What is she/he ambivalent about? What could she/he take or leave?
5. What do you not care about at all?
6. What does she/he not care about at all?
7. What are areas of obvious agreement in the above?
8. What are areas of obvious disagreement in the above?
9. What opportunities do you see to take 100 percent of the responsibility for the relationship, or “be the change you want to see in the world”?
10. What other questions belong here? How would you answer them?
11. What insights have you had, if any, as you’ve answered these questions?
12. What’s your next step?

## Establish Fit

In any relationship, the dynamics between the two partners is a significant factor in defining its failure or success. It is no different for the board chair and chief executive relationship. One hopes there is a good, natural “fit” between the two individuals to serve as a base. However, this scenario is not always the case and both partners are challenged to work hard to create a functional working relationship. The board

chair-chief executive partnership requires commitment and effort from both partners. Each should take responsibility for his or her behaviors and actions and be open to constructive feedback not just on the tasks at hand, but on the partnership itself.

—*The Board Chair Handbook*<sup>1</sup>

People vary in a squidillion interesting, and sometimes frustrating, ways. I've found the following characteristics smooth or hinder high-level, executive working relationships, depending on the level of similarity and difference and each person's general level of tolerance for difference.

It's generally most productive to yield to your partner's preference in these matters, whenever practical. But you have to know her or his preference to yield, so consider the following questions. Better yet, ask them directly of your partner.

1. What's your decision speed? Do you decide slowly, or quickly?
2. What about your partner?
3. Are you more tactical or strategic? Or, in other terms, more of a trees or a forest person?
4. What about your partner?
5. How much information do you need to make a decision? A lot or a little?
6. What about your partner?
7. What's your detail orientation? Detail-oriented, or not?
8. What about your partner?
9. Are you more a black-and-white or shades of gray thinker?
10. What about your partner?
11. What do you tend to emphasize more: Relationships or results?
12. What about your partner?
13. Are you an internal processor (you keep your thoughts mainly in your head) or an external processor (you process your thoughts by talking about them, or "think out loud")?
14. What about your partner?
15. Would you call yourself a manager, technician, or entrepreneur, in an E-Myth sense?<sup>2</sup>
16. What about your partner?
17. Would you call yourself mostly a clarifier, ideator, developer, or implementer?<sup>3</sup>
18. How often have you succeeded in working with someone where the chemistry was right from the start—you just "clicked"?
19. Now, the opposite: How often have you succeeded in working with someone where the chemistry was NOT right from the start—you didn't "click"?
20. What other questions belong here? How would you answer them?
21. What insights have you had, if any, as you've answered these questions?
22. What's your next step?

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<sup>1</sup>Mindy R. Wertheimer, *The Board Chair Handbook, Third Edition*. BoardSource, 2012.

<sup>2</sup>Michael E. Gerber. *The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It*. HarperCollins, 2004.

<sup>3</sup>These are descriptions of creative problem-solving styles from the FourSight assessment available at [foursightonline.com](http://foursightonline.com). Just take a guess for right now. See "Exercise: Shared Language" in Chapter 4 for more about the FourSight assessment. It's pretty cool.

## Gut Check: Is It You?

“ The unexamined life is not worth living.—Socrates

“ Know thyself.—Ancient Greek aphorism

Look in the mirror.

Are you attractive?

No, of course I don't mean in a physical sense. I mean attractive to other leaders—the type of growth-oriented, high-achieving people you must surround yourself with to drive your own success. Growth-oriented, high-achieving people are attracted to people with the same qualities. If you lack those qualities, you're going to have a tough go of it.

Stick with me for a moment and read this question carefully: Are you the kind of leadership partner that the leadership partner you want would want?

Let's quickly try another example to drive the point home. They say that if you want to get married, you shouldn't spend most of your time and energy finding someone and convincing her or him to marry you. Rather, you should spend most of your time and energy *becoming* the type of person that the kind of person you want to marry would want to marry. Then, you'll attract each other.

If you've had a succession of bad relationships with chief executives or board chairs, it pays to examine whether you or your organization are the problem. Don't be like a person I knew fired from eight jobs (eight!) in rapid succession whose friends had to spring for an intervention banner reading, “You are the common denominator.”

Warning: I'm throwing you in the deep end here. This is the hardest work you'll do. I told you at the start of the chapter that self-reflection is difficult. Well, self-reflection that sends you rating yourself against standards and looking for personal flaws is even more so. When the going gets tough—which it will—call someone for help.

1. How many good partnerships have you had?
2. What concrete results did each partnership achieve?
3. What did you, personally, do to make each partnership work well?
4. What mistakes did you, personally, make in each partnership?
5. What would have to change to make you want to partner with someone just like yourself?
6. What other questions belong here? How would you answer them?
7. What insights have you had, if any, as you've answered these questions?
8. What's your next step?

## Leadership Behaviors

Are you an exemplary leader? According to renowned leadership experts James M. Kouzes and Barry Z. Posner, exemplary leaders consistently practice the following five behaviors:<sup>4</sup>

1. Leaders model the way by clarifying values and setting the example.
2. Leaders inspire a shared vision. They envision exciting and ennobling possibilities and enlist others in a common vision.
3. Leaders challenge the process by searching for opportunities to grow, innovate, and improve. They experiment and take risks.
4. Leaders enable others to act. They foster collaboration and build trust, and strengthen everyone's capacity to deliver results.
5. Leaders encourage the heart by recognizing contributions and celebrating values and victories.

Assess yourself:

- Give yourself two points if a statement above describes you.
- Subtract two points if a statement above does not describe you.

Now, reflect on the assessment.

1. How do you measure up to the exemplary leader standard?
2. What would it be like for you to partner with someone who practices these leadership behaviors with excellence?
3. What do you need to change about yourself to be attractive to a leader like that?
4. What other questions belong here? How would you answer them?
5. What insights have you had, if any, as you've answered these questions?
6. What's your next step?

## Leadership Qualities

Author and executive coach Andrew Neitlich argues elegant leaders have four qualities. They are:

- Simple
- Powerful
- Practical
- Graceful

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<sup>4</sup>James M. Kouzes and Barry Z. Posner. *The Leadership Challenge*, Fourth Edition. Jossey-Bass, 2007.



Neitlich writes:<sup>5</sup>

There are four essential ways in which an elegant leader creates the future:

1. Simply. Elegant leaders distill infinite information and possibilities into the one or two essential elements that will make the largest difference. Their speech, thinking, and actions all reflect simplicity.
2. Powerfully. Simplicity alone is superficial. Elegant leaders create the future in simple ways that also have power. Like the lever in basic physics, elegant leaders find ways to have a huge impact with minimal force.
3. Practically. Elegant leaders are not dreamers, or academics. They live in the real world, take action, and focus on what will work. An elegant leader will implement an 80 percent solution, or make decisions with 60 percent of the information he or she wants, in order to move things forward in a practical way.
4. Gracefully. Elegant leaders do their work with refinement. They are consummate professionals, simultaneously strengthening relationships while moving toward their goals. They maintain impeccable character, and remain resilient in good times and bad.

How do you measure up?

1. What do you do and say that shows you're *simple*?
2. What do you do and say that shows you're *powerful*?
3. What do you do and say that shows you're *practical*?
4. What do you do and say that shows you're *graceful*?
5. What would it be like for you to partner with someone who exemplifies these leadership qualities?
6. What do you need to change about yourself to be attractive to a leader like that?
7. What other questions belong here? How would you answer them?
8. What insights have you had, if any, as you've answered these questions?
9. What's your next step?

## Organizational Capacity

How attractive is your organization to growth-oriented, high-achieving leaders?

A high-capacity organization is one that attracts high-capacity leaders. These are people of accomplishment who are devoted to personal and professional growth. Often, but not always, they have worked for large organizations that have leadership training, coaching, and mentoring programs. So they arrive prepared and don't need to be brought up to a minimum standard by

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<sup>5</sup>Andrew Neitlich, *Elegant Leadership: Simple Strategies, Remarkable Results*. Chatham Business Press, 2006.

harried chief executives who may not have the skills and knowledge themselves, or, if they do, may not have the time because program, operations and fundraising command all of their attention.

On the other end, low-capacity organizations attract low-capacity leaders, if they can attract any leaders at all. This creates what I call the “low capacity bowl circle.” Low-capacity organizations are always “circling the bowl,” so to speak, because they can’t attract the leaders necessary to build an organization that would be attractive to leaders. To quote a certain villain from the movie *Austin Powers 2: The Spy Who Shagged Me*, “It’s a vicious cycle.”

1. When outsiders look at your organization, what do they see in terms of its capacity?
2. How many of your community’s high-capacity leaders would seriously consider joining your board?
3. What do you need to do about your answers to the above questions?
4. How long will it help?
5. How do you, personally, need to change?
6. Whose help will you enlist?
7. What other questions belong here? How would you answer them?
8. What insights have you had, if any, as you’ve answered these questions?
9. What’s your next step?

## Chief Executive Bearing

This may seem like it’s coming out of left field, but I’m going to conclude this section by asking you to consider insights from a book titled *Selling to VITO: The Very Important Top Officer*.

The author, Anthony Parinello, makes his living training salespeople how to reach out first to the CEO, or the most relevant division president; the top officer. He encourages his readers to “own” the following traits and attitudes he’s found common among top officers. (My interpretation of “own”: Act from consistently.)

Parinello states:

This is how they operate on a day-to-day basis. This is how they look at the world. This is how they post results.

1. I am passionate about life and business.
2. I have established a good work/life balance.
3. I am constantly expanding my communication skills.
4. I am curious.
5. I am self-determined.
6. I focus to completion.
7. I have integrity.

8. I am a team player.
9. I am optimistic and upbeat.
10. I am interested in problem solving.
11. I approach my life and work with a sense of purpose.
12. I am resourceful enough to dig for the strategies, resources, and answers I need.

Now for your reflection.

1. Which of the above traits and attitudes do you act from consistently?
2. Which of the above traits and attitudes do you not possess at all?
3. What other questions belong here? How would you answer them?
4. What insights have you had, if any, as you've answered these questions?
5. What's your next step?

## 4. Develop Your Partnership

Nonprofit board chairs and chief executives can drive greater mission impact for their organization and more job satisfaction for themselves when they work intentionally to build their leadership partnership.

How much greater mission impact and job satisfaction could you achieve with:

- An open, trusting relationship?
- Clear expectations of each other?
- A plan for regular communication, at times and with methods that appeal to both parties?

This chapter shows how to build a healthy, even transformational, leadership partnership with all of the above.

### Check the Prerequisites

There are two prerequisites to a healthy nonprofit leadership partnership:

1. Shared mission and vision
2. Growth mindset and abundance thinking

This section helps you assess whether your partner—and, indeed, you—have what it takes.

### Shared Mission and Vision

1. How do you define mission—the business term, not your actual mission?
2. How would your partner define mission—the business term, not your actual mission?
3. What is your organization's mission, in your own words? (Don't peek at your mission statement!)
4. How would your partner answer?
5. How do you define vision—the business term, not your actual mission?
6. How would your partner define vision—the business term, not your actual mission?
7. What is your organization's vision, in your own words? (Don't peek at your vision statement!)
8. How would your partner answer?
9. What are areas of obvious agreement in the above?

10. What are areas of obvious disagreement in the above?
11. To what extent could lack of clarity in your organization's mission and/or vision statements explain any disagreement you're seeing?
12. What other questions belong here? How would you answer them?
13. What insights have you had, if any, as you've answered these questions?
14. What's your next step?

## Growth Mindset and Abundance Thinking

It's extremely difficult for people with growth mindsets to work closely with fixed-mindset people. People with fixed mindsets can change—renowned Stanford psychologist Carol Dweck details how in her book *Mindset: The New Psychology of Success*—but it's hard and time-consuming work.

Since I've just appealed to a scientist's authority, I have to note the following is not a scientifically valid assessment. It's a rough and ready tool to help you understand yourself, and others, with an eye toward fostering your own personal growth and finding others who want to grow with you and encourage you along the way. Also, note these questions are about a growth mindset applied to organizational development, not personal development. As such, they really get at abundance thinking vs. scarcity thinking.

Make a score sheet and start with zero. Subtract two points for each of the following statements you agree with:

1. It's all about pie. Two pies, actually. Pie 1, Resources for All Charitable Work: There is a fixed pie of resources for charitable work. Pie 2, Resources for Our Charitable Work: 90 percent or more of our pie must be spent on program, and only 10 percent or less can be spent on overhead.
2. We must operate from the existing pie, which is this year's annual budget.
3. The pie may get very slightly bigger to keep up with inflation, but dramatic increases ain't gonna happen.
4. Operating on a shoestring is more a badge of honor than is achieving measurable, sustainable social change.
5. Progress is limited by existing resources.

Now, add two points for each of the following statements you agree with:

1. You can always make the pie bigger and tastier (larger in scale and more impactful) by adding ingredients (resources).
2. Further, adding ingredients to your pie doesn't take away ingredients from someone else's pie. There are plenty of ingredients to go around.
3. We should be working to make next year's pie bigger than this year's because hungry people sure aren't getting any fewer in number or less hungry for pie.

4. Dramatic increases in the size of the pie come with dramatic increases in our capacity.
5. Achieving measurable, sustainable social change is more a badge of honor than operating on a shoestring.
6. Progress is limited by the size of our dreams.

(You can tell this isn't a scientific assessment because there were five statements in the first block, and six in the second. I warned you!)

Subtract two points for each of the following statements you agree with:

1. Doing well while doing good is unethical and unseemly—at both organizational and personal levels.
2. Therefore, our organization can't have nice things, nor can our staff.
3. Working at a nonprofit is a sacrificial act, not a fulfilling one.
4. If you hold more than a minimal operating reserve, you're not helping enough people.
5. We can't invest in future growth because there are too many people to help now.
6. We must run nonprofit organizations on a shoestring budget.
7. Direct service to people is "program" and everything else is "overhead." Overhead must be kept to a minimum.
8. We are entitled, because we are nonprofit, to receive goods and services for free.

Add two points for each of the following statements you agree with:

1. Doing well while doing good is ethical and seemly because we are aligning our resources with our values and leading by example.
2. Therefore, our organizations and staff members must have nice things for the productivity and morale boosts they provide.
3. Working at a nonprofit is a fulfilling act.
4. If you build a strategic investment reserve over and above a minimal operating reserve, you may help fewer people in the very short term but will help more people in the medium and long term because your capacity to serve more people and the quality of your programs will both increase.
5. We must invest in future growth, even if it means not immediately helping every possible stakeholder, because we must expand our programs' capacity and quality.
6. We must run charitable organizations on budgets that match the scale of the problems they are trying to solve in the places they're trying to solve them.
7. Everything is program. There is no overhead.
8. Because we see for-profit businesses as partners in social change, we reject entitlement thinking and strive to pay market price for goods and services.

## Wrapping Up

1. What do you think about your score on the above assessment?
2. What do you need to do about that?
3. How do you think your partner's scores would turn out on the above assessment?
4. What do you need to do about that?
5. What other questions belong here? How would you answer them?
6. What insights have you had, if any, as you've answered these questions?
7. What's your next step?

## Key 1: Trust and Transparency

### Trust

We'll look at trust first, then trustworthiness.

1. How do you define trust?
2. If I were to send a third-grader to your office with a checklist after instructing her or him to look for signs of trust in your relationships, what would be on the checklist? (Hint: Stick with easily observed behaviors. This is a third-grader, and not a psychic.)
3. What's positive for you about trust?
4. What's negative for you about trust?
5. How has being trusting helped you in the past?
6. How has being trusting hurt you in the past?
7. How do you define trustworthiness?
8. If I were to send a third-grader to your office with a checklist after instructing her or him to look for signs that you're being trustworthy, what would be on the checklist? (Hint: Stick with easily observed behaviors. This is a third-grader, and not a psychic.)
9. What's positive for you about trustworthiness?
10. What's negative for you about trustworthiness?
11. How has being trustworthy helped you in the past?
12. How has being trustworthy hurt you in the past?
13. What other questions belong here? How would you answer them?
14. What insights have you had, if any, as you've answered these questions?
15. What's your next step?

Now we look at trust between you and your partner.

1. How much trust is there between you?

2. How would your partner answer?
3. Refer to the trust definitions below. What kind of trust do you think exists between you and your partner?
4. How would your partner answer?
5. How can you be more trusting?
6. How can your partner be more trusting?
7. How can you be more trustworthy?
8. How can your partner be more trustworthy?
9. What other questions belong here? How would you answer them?
10. What insights have you had, if any, as you've answered these questions?
11. What's your next step?

### Patrick Lencioni's Trust Definition

Bestselling business author Patrick Lencioni's address work teams of more than two people, but the insights apply to the two-person chief executive-board chair leadership partnership:

In the context of building a team, trust is the confidence among team members that their peers' intentions are good, and that there is no reason to be protective or careful around the group. In essence, teammates must get comfortable being vulnerable with one another.

This description stands in contrast to a more standard definition of trust, one that centers around the ability to predict a person's behavior based on past experience. For instance, one might "trust" that a given teammate will produce high-quality work because he has always done so in the past.

As desirable as this may be, it is not enough to represent the kind of trust that is characteristic of a great team. It requires team members to make themselves vulnerable to one another, and be confident that their respective vulnerabilities will not be used against them. The vulnerabilities I'm referring to include weaknesses, skill deficiencies, interpersonal shortcomings, mistakes, and requests for help.<sup>1</sup>

### Mary Hiland's Definitions

These come from her research studies of trust in chief executive-board chair relationships.<sup>2</sup>

1. The lowest level, calculus-based trust, exists to the extent that punishments and/or rewards motivate someone to invest in a relationship or to remain trustworthy himself.

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<sup>1</sup>Patrick Lencioni, *The Five Dysfunctions of a Team*. Jossey-Bass, 2002.

<sup>2</sup>Mary Hiland, "The Board Chair-Executive Director Relationship: Dynamics that Create Value for Nonprofit Organizations." *Journal for Nonprofit Management*, 2008.



2. The next level, knowledge-based trust, results from knowing each other to an extent that facilitates predictability. This level includes trust that built as board chairs and executives gained confidence in each other's competence, showed respect, communicated effectively, and honored agreements and commitments.
3. Identification-based trust results from going beyond knowing each other to identifying with each other. ... Pairs with identification-based trust act on behalf of each other and can substitute for each other in other interpersonal interactions.

## Transparency

These questions are going to look remarkably familiar.

1. How do you define transparency?
2. If I were to send a third-grader to your office with a checklist after instructing her or him to look for signs of transparency in your relationships, what would be on the checklist? (Hint: Stick with easily observed behaviors. This is a third-grader, and not a psychic.)
3. What's positive for you about transparency?
4. What's negative for you about transparency?
5. How has being transparent helped you in the past?
6. How has being transparent hurt you in the past?
7. What other questions belong here? How would you answer them?
8. What insights have you had, if any, as you've answered these questions?
9. What's your next step?

## Humility

**“** There is no respect for others without humility in one's self.—Henri-Frédéric Amiel, philosopher

You know how LinkedIn notifies you when contacts add skills to their profiles?

My friend Ben added these, which then showed up in his contacts' news feeds:

- Awesomeness
- Humility

That was awesome.

But I digress. Here's the third verse, (almost the) same as the first.

1. How do you define humility?
2. If I were to send a third-grader to your office with a checklist after instructing her or him to catch you being humble, what would be on the checklist? (Hint: Stick with easily observed behaviors. This is a third-grader, and not a psychic.)
3. What's positive for you about humility?
4. What's negative for you about humility?
5. How has being humble helped you in the past?
6. How has being humble hurt you in the past?
7. What other questions belong here? How would you answer them?
8. What insights have you had, if any, as you've answered these questions?
9. What's your next step?

## Exercise: Shared Language

You'll get three things from this exercise:

1. New knowledge about yourself.
2. New knowledge about your partner.
3. Perhaps the most valuable: A shared language for discussing your similarities and differences with your partner. The shared language comes in the form of new terms specific to the profile or assessment you choose, e.g. "Dominance," "Influence," "Steadiness" and "Conscientiousness" from the DiSC assessment, or "Clarifier," "Ideator," "Developer" and "Implementer" from the FourSight assessment.

Instructions:

1. Take any off-the-shelf personality profile or thinking style assessment that interests both of you, or that you've both taken.<sup>3</sup> You know the type: Myers-Briggs, DiSC, StrengthsFinder, FourSight, etc.
2. Discuss the results.
3. Take a new one each quarter.

If you're both completely ambivalent about which assessment to choose, I'd go with the less-well-known FourSight, because it shows how two people's thinking styles can clash, be complementary, or both.

For example, my dominant styles are Ideator, Clarifier, Developer, and Implementer, in that order. This makes me an "Early Bird" in FourSight's terms:

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<sup>3</sup>If one of you hasn't taken any in the past, that's a really bad sign about the state of your professional development; you need to get on that right now.

Early Birds take on a challenge with lots of energy. They enjoy finding problems and opportunities to tackle. They are quick to think up ideas and possible solutions. Early Birds at their best have a sixth sense for which problems to focus on and effortlessly come up with clever ideas and original solutions.

Their potential watch out is the half-finished initiative—those really great ideas that never get off the ground. That's because, after bringing the problem into focus and coming up with brilliant ideas, they tend to grind to a halt. Their energies fade rapidly as their brilliant idea goes through necessary stages of refinement and gets put into action.

Early Birds can benefit from strategies that help them see an idea through to the end. They may do well to collaborate with Developers and Implementers. They can improve their innovative output by learning to pace themselves and save enough energy for the final stages of refining solutions and bringing them to action. Quite simply, Early Birds would be wise to keep their eye on one task before getting distracted by the next interesting opportunity.

Yep, describes me to a OOH, SQUIRREL!

## Exercise: Owner's Manual

1. Both of you, take an off-the-shelf thinking style assessment such as FourSight or a personality assessment such as Myers-Briggs or DiSC.
2. Use language from the assessment report, plus words of your own, to write out a brief “owner’s manual” about yourself, containing your essential preferences and pet peeves about working relationships.

Here’s how the bestselling teamwork expert Patrick Lencioni recommends structuring your owner’s manual:<sup>4</sup>

1. **Becoming Familiar with Me:** This section describes the highlights of your personality. Many of your comments will be global in nature and relate to both personal and work environments. It is also helpful to include comments that are specific to work situations. Include your areas of strength as well as your blind spots and pitfalls.
2. **Cautions:** This section shares insights on your reaction to stressful situations and confrontations, as well as red flags that would be helpful for team members to know.
3. **Final Note:** This section declares the areas that you are actively working to improve.

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<sup>4</sup>Adapted from Patrick Lencioni, *The Five Dysfunctions of a Team, Facilitator’s Guide*. Pfeiffer, 2012.

## Exercise: Two-Person Book Club

There's nowhere to hide! With just two people in your book club, your partner will know whether you read the book.

Books to read together:

- *Power of 2: How to Make the Most of Your Partnerships at Work and in Life*, by Rodd Wagner and Gale Muller
- *Powers of Two: Finding the Essence of Innovation in Creative Pairs*, by Joshua Michael Shenk
- *The Nonprofit Leadership Team: Building the Board-Executive Director Partnership*, by Fisher Howe
- *Building the Governance Partnership: The Chief Executive's Guide to Getting the Best from the Board*, by Sherill K. Williams
- Biographies of famous leadership pairs:
  - Steve Jobs and Steve Wozniak
  - Michael Eisner and Frank Wells
  - Meriwether Lewis and William Clark
  - Tenzing Norgay and Edmund Hillary
  - Bill Hewlett and Dave Packard
  - Bill Gates and Paul Allen
  - Larry Page and Sergey Brin
  - Ben Cohen and Jerry Greenfield

## Key 2: Clear Expectations

The expectations of nonprofit chief executives and board chairs constitute high callings not to be entered into lightly. They call these leaders to hard work and greater personal achievement. Developing these qualities is an investment of lifelong value; a person with them greatly increases her or his chance of success in other endeavors. Who, after all, would not want to work with a person who can lead, who stays involved, who knows who to run a meeting, is a peacemaker, and an intentional thinker about developing future leaders for the organization?

1. What expectations do you have of your partner?
2. What expectations does your partner have of you?
3. Which of the expectations are measurable, observable behaviors?
4. Which of them are harder to measure and observe?
5. Which of the expectations are actually low-level tasks, and which are truly high-level expectations?
6. How will you avoid acting like a micromanager?
7. What other questions belong here? How would you answer them?
8. What insights have you had, if any, as you've answered these questions?
9. What's your next step?

### Expectations of the Chief Executive

How do you/how does your partner measure up to the board's expectations of the chief executive, taken from Fisher Howe's book *The Nonprofit Leadership Team*?

1. **Vision:** Must have a strategic outlook while making day-to-day management decisions.
2. **Initiative:** Boards look to the executive and staff "to propose and prepare actions."
3. **Proficiency:** In programmatic matters as well as managerial skills.
4. **Productivity:** One who produces results in quantity, with quality, on time.
5. **Communication Skills:** Writes and speaks well, to the community, board, and staff.
6. **Openness:** In finances and fundraising, but also candor with the board.
7. **Responsiveness:** To the board's "declared decisions and policies," as well as the board's need for support in governing well.

### Expectations of the Board Chair

How do you/how does your partner measure up to the board's and chief executive's expectations of the board chair, taken from Fisher Howe's book *The Nonprofit Leadership Team*?

**Generalship:**

The definition of leadership applies first to the chair: having a vision for the organization and the ability to attract, motivate, and guide followers to achieve that vision.

Especially in the board's relationship to the executive, board members look to the chair to be the focal point of direction: to build the support for the executive while maintaining the oversight, to encourage or restrain. The chair conveys the board's day-in and day-out wishes and will to the executive.

**Involvement:** Present, participating, not distant or "letting things go their own way."

**Presiding:** Ensures meetings are interesting.

Presiding is an art; a chair needs to be good at it. The effective chair will stimulate and restrain, will get views out on the table, keep the discussion germane, but above all be outcome-driven in achieving resolution. Board members can lose interest rapidly with ill-directed meetings.

**Bridge-Building:** Peacemaking and mediation and get-people-working-together skills are necessary for, as Howe notes drily, "Issues arise in the governance and management of nonprofit organizations and feelings can run high."

**Prestige:** In the community isn't necessary, but it helps, Howe writes.

**Anticipation:** Howe's word for succession planning. The board chair should work intentionally to identify and develop her or his successor.

## Clarifying Expectations

1. How would you prioritize the chief executive expectations above?
2. How would you prioritize the board chair expectations above?
3. Which expectations would you move from one role to the other (i.e., make a chief executive expectation a board chair expectation or vice versa)?
4. What would you make an expectation for both parties?
5. What would you change?
6. What would you delete?
7. Where does an expectation need to be more specific?
8. Where does an expectation need to be less specific?
9. What other questions belong here? How would you answer them?
10. What insights have you had, if any, as you've answered these questions?
11. What's your next step?

## Exercise: Responsibilities and Expectations

Go through a roles and responsibilities list together and discuss it. Examine together how the “traditional roles and responsibilities” fit your relationship and each person’s talents, and how they aren’t a fit.

For a perspective from the private sector that takes only minimal adaptation to be useful, see “Essential Elements of an Effective CEO-Board Relationship” from Russell Reynolds Associates, [russellreynolds.com](http://russellreynolds.com).

For a list specific to nonprofits, you’ll need to combine two BoardSource books:

- Richard T. Ingram, *Ten Basic Responsibilities of Nonprofit Boards, Second Edition*. BoardSource, 2009.
- Rick Moyers, *The Nonprofit Chief Executive’s Ten Basic Responsibilities, Second Edition*. BoardSource, 2012.



## **Exercise: Prepare for the Next Board Meeting**

Discuss the following questions together.

1. What do we want the board to accomplish at its next meeting?
2. How does working together make achieving that goal more likely?
3. How will we show up as leadership partners?
4. What does joint success look like?
5. What do we want people to say about us after the meeting?
6. What does unity look like?
7. How will we avoid surprising each other?
8. How will “have each other’s back”?
9. What will the chief executive do at the meeting?
10. What will the board chair do at the meeting?
11. What will the chief executive say at the meeting?
12. What will the board chair say at the meeting?
13. What other questions belong here? How would we answer them?
14. What insights have we had, if any, as we’ve answered these questions?
15. What’s our next step?

## Key 3: Frequent Communication

Start with a general assessment of your communication with others in general.

1. What about communication has worked well in the past when you've collaborated closely with a single person?
2. What about communication has gone poorly in the past when you've collaborated closely with a single person?
3. What are your communication pet peeves?
4. What things about communication, that most people brush off, do you take seriously?
5. What things about communication, that most people take seriously, do you brush off?
6. What other questions belong here? How would you answer them?
7. What insights have you had, if any, as you've answered these questions?
8. What's your next step?

Next, assess your communication with your leadership partner specifically.

1. How frequently do you communicate?
2. Is this communication, where it's a two-way exchange of value? Or is it reporting?
3. How well does the mode of communication work for you?
4. Would a change make a difference?
5. How often are your conversations strategic?
6. How often are your conversations tactical?
7. What are your most frequent conversation topics?
8. What are your least frequent conversation topics?
9. What makes your conversations stimulating?
10. What makes your conversations boring?
11. What makes your conversations rushed?
12. What makes your conversations unhurried?
13. What other questions belong here? How would you answer them?
14. What insights have you had, if any, as you've answered these questions?
15. What's your next step?

## Frequent as in Weekly

Weekly conversations are a tall order. Ensure the investment of time and energy creates results.

1. How often should you talk?
2. For how long should you talk each time?

3. What will you do to ensure you keep your commitment to talk weekly?
4. What will you ask your partner to do to ensure she/he keeps her/his commitment to talk weekly?
5. What information will you share every time?
6. What materials will you provide each other in advance?
7. What strategic topics will you plan in advance to discuss so the conversations don't get overly tactical and boring?
8. What other questions belong here? How would you answer them?
9. What insights have you had, if any, as you've answered these questions?
10. What's your next step?

## Keep a Conversation Calendar

When you use a conversation calendar, you guard against skipping uncomfortable topics, like succession planning, and guard against “managing by brush fire”—talking only about the immediate and urgent.

This is like the content calendars your marketing, communications, and social media directors use. Say you're a NeighborWorks America affiliate; you'll have NeighborWorks Week in your calendar weeks in advance of the actual week so you can prepare content for your communication channels.

These in-depth conversations you'll have about critical strategic topics are not meant to stay between you two. They are meant to start strategic conversations that cascade through the organization like a chocolate fountain. The strategic chocolatey goodness starts at the top with you two, goes down to the board and leadership team tier, down to the line staff, down to external stakeholders, and the goodness bubbles back up to start the cascade again.

These questions do double duty in strategic planning. These can help you plan to plan. Find especially meaty questions that really stimulate both of you intellectually. Then ask them of your peers as part of regular strategic thinking, a planning process, preferably both.

There are three sets of Conversation Starters in this book, totaling 24 conversations. This is full year of weekly conversations, assuming you discuss each topic twice, and take four weeks off.

### Chapter 5: People

1. Building a Strong Board Leadership Bench
2. Building a Strong Staff Leadership Bench
3. Professional Development
4. Salaries and Benefits
5. Board Culture
6. Staff Culture
7. Board Engagement
8. Board Recruitment

9. Chief Executive Evaluation
10. Board Chair and Board Evaluation

## Chapter 6: Programs

1. Mission and Vision
2. Meeting Community Needs
3. Sustainability
4. Revenue Development
5. Business Model
6. External Threats
7. Internal Threats

## Chapter 7: Processes

1. Strategic Planning
2. Governance
3. Transparency
4. Marketing
5. Internal Communication
6. Succession Planning for the Board Chair
7. Succession Planning for the Chief Executive

All the questions assume you'd never dream of micromanaging your partner by forcing advice or a direction on her or him. Rather, you're seeking and receiving wise counsel and perspective from another domain that will sharpen your thinking. You won't use all of it, but you'll value all of it.

## Be Sure to Really Listen

How often do you *really* listen? People often default to listening to respond; they're forming their response in their head while the other person's still talking, and end up not hearing much or any of what the other person said.

There are far more respectful and productive ways of listening. Here are several from executive coach Andrew Neitlich's book *Elegant Leadership: Simple Strategies, Remarkable Results*. Read them, and then answer the reflection questions below.

**Listen to listen, without fixing, judging, or interrupting.** This type of listening can be effective at almost any time. It builds relationships, leads to deeper understanding, and lets people be heard.

**Listen to understand the other person's interests, commitments, and aspirations.** This type of listening helps a leader develop a mutually beneficial solution with another person. It also helps to understand somebody's reasons for resisting, complaining, or doubting an idea. For instance, "Joe, if I have heard you right, you're not complaining about this idea. You're just saying that you are committed to quality. Anything we do has to improve or maintain current levels of quality. Right?"

**Listen for the other person's talents and interests.** Listening for talents and interests allows a leader to point people in a direction that will engage and excite them. It also focuses on other people's unique gifts. For instance, "Mary, you're telling me that you enjoy meeting people, and are pretty good at convincing people to make an appointment with you. I agree. What would be a way for the organization to take advantage of these talents...?"

**Listen for an opportunity to move things forward.** Elegant leaders are brilliant at listening for ways to move things forward. When people keep talking about exciting visions and possibilities, elegant leaders ask them to commit to specific actions and accountability. When people seem stuck collecting and analyzing data, elegant leaders challenge them to make a recommendation. When people make commitments, but encounter hurdles and give up, elegant leaders encourage them to persist. When people identify problems, elegant leaders ask them to take responsibility for solving their problems. In this type of listening, leaders ask, "What can I ask or say to move people closer to results?"

**Listen for opportunities to serve.** This type of listening means keeping in mind the question, "How can I help?" It means encouraging and responding to requests for support, advice, and resources. It does not mean meddling, micro-managing, or offering unsolicited suggestions.

**Listen for your impact.** Often, we fail to have the impact on somebody that we had hoped. For instance, we want somebody to be inspired, and instead they are insulted or bored. Listening for your impact means asking questions and observing the other person to find out whether you achieved the result you wanted to achieve. For instance, you might ask, "I had wanted you to leave this meeting feeling acknowledged for how much you have contributed to our fourth quarter revenue. Was I successful?"

Now, think about conversations you've had with your leadership partner. Or, if your relationship's brand-new, think about a past business collaboration.

1. What are examples of times you've listened to listen, without fixing, judging, or interrupting?
2. What are examples of times you've listened to understand the other person's interests, commitments, and aspirations?

3. What are examples of times you've listened for the other person's talents and interests?
4. What are examples of times you've listened for an opportunity to move things forward?
5. What are examples of times you've listened for opportunities to serve?
6. What are examples of times you've listened for your impact?
7. What's been the effect on business relationships when you've listened in the default way, to respond?
8. What's been the effect on business relationships when you've listened in the more powerful ways listed above?
9. What's been the effect on business results when you've listened in the default way, to respond?
10. What's been the effect on business results when you've listened in the more powerful ways listed above?
11. What's your default way of listening?
12. What's your partner's default way of listening?
13. What new way of listening will you resolve to try?
14. What other changes do you need to make?
15. What other questions belong here? How would you answer them?
16. What insights have you had, if any, as you've answered these questions?
17. What's your next step?

## Exercise: Set Up the Meetings

Get your check-in meetings on the calendar now. What gets scheduled gets done, you know.

At a minimum you want to set your appointments for talking now. Think about:

- **Frequency:** Weekly? Biweekly? Monthly? I recommend weekly, in part because it makes each conversation shorter in ...
- **Duration:** Schedule an hour. The talk likely won't last that long; you can treat the remainder as a time slot you'll devote to working on the relationship.
- **Content:** What information will you share every time?
- **Preparation:** What materials will you provide each other in advance of the call?

## 5. Conversation Starters: People

1. Building a Strong Board Leadership Bench
2. Building a Strong Staff Leadership Bench
3. Professional Development
4. Salaries and Benefits
5. Board Culture
6. Staff Culture
7. Board Engagement
8. Board Recruitment
9. Chief Executive Evaluation
10. Board Chair and Board Evaluation

These are designed to be standalone printouts of one to three pages. You'll see replication. I don't want you to have to cross-reference and shuffle papers when the two of you invest critical time in your most important relationship.



# Building a Strong Board Leadership Bench

## Perspectives to Consider

A good board is a victory, not a gift.

—Cyril O. Houle, *Governing Boards: Their Nature and Nurture*

## Ask Your Partner ...

1. What leadership capabilities do we require so the board chair becomes less critical to our success, and so other people can take on more significant leadership roles?
2. What are the qualities and skills this organization will need in its board one year from now? Three years? Five?
3. How can we make/keep our board one of this community's "A" boards—one people get in line to join?
4. What do we need to change about the leadership quality and skill expectations we have of prospective members?
5. What can we change about the nominating process to ensure a deeper leadership bench?
6. What can we change about the board's culture so we attract and retain the right kind of people?
7. What flight risks exist on the board?
8. Where does strong board leadership appear in our strategic plan?
9. What other questions belong here? How would we answer them?
10. What insights have we had, if any, as we've answered these questions?
11. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
12. What's our next step?
13. What other questions belong here? How would we answer them?
14. What insights have we had, if any, as we've answered these questions?
15. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
16. What's our next step?

# Building a Strong Staff Leadership Bench

## Perspectives to Consider

The true crisis is not a lack of bodies to fill nonprofit jobs; rather, it is the deficit of investment in current nonprofit people and the systems that support them.

—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

Many nonprofit organizations don’t invest enough in their people. This leaves the mission and the board high and dry when the chief executive leaves.

## Ask Your Partner ...

1. What leadership capabilities do we require so I, the chief executive, become less critical to our success, and so other people can take on more significant leadership roles?
2. What are the qualities and skills this organization will need in its leadership team one year from now? Three years? Five?
3. How can we make/keep our organization one of this community’s most attractive employers—one that attracts and retains highly talented people who fit our culture?
4. What do we need to change about the leadership quality and skill expectations we have of prospective members?
5. What can we change about the hiring process to ensure a deeper leadership bench?
6. What can we change about the organization’s culture so we attract and retain the right kind of people?
7. What flight risks exist on the leadership team?
8. How much staff capacity did we add the last we added new programmatic work?
9. Where does strong staff leadership appear in our strategic plan?
10. What other questions belong here? How would we answer them?
11. What insights have we had, if any, as we’ve answered these questions?
12. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
13. What’s our next step?

# Professional Development

## Perspectives to Consider

The true crisis is not a lack of bodies to fill nonprofit jobs; rather, it is the deficit of investment in current nonprofit people and the systems that support them.

—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

Not everybody is created equal, and it’s important for companies to identify those high potentials and treat them differently, accelerate their development and pay them more. That process is so incredibly important to developing first-class leadership in a company.

—Anne M. Mulcahy, former chairwoman and CEO, Xerox Corp.

One of my concerns is the mindset we have in the nonprofit world that certain types of expenses can’t be incurred unless someone else pays for them. Professional development ought to be a core part of every organization’s operating budget, just like the phone system and health insurance.

—Rick Moyers, vice president, The Meyer Foundation

With below-market salaries an accepted norm at nonprofits, professional development substitutes as a major opportunity to both enhance and recognize performance. Therefore, the dearth of training and education opportunities provided by many organizations is a major impediment to morale, productivity, and retention.

—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

## Ask Your Partner ...

1. What would become possible for the mission and the people we serve if our people were 1 percent more capable? 10 percent? 25 percent?
2. What professional development needs does the board chair have?
3. What professional development needs does the chief executive have?
4. What professional development needs does the leadership team have?
5. What professional development needs does the staff have?
6. What professional development needs do our volunteers have?
7. Which of our people are ready to move up?
8. Which of our people are well-placed where they are?
9. Which of our people need to move out?
10. What’s a crazy idea for a double, triple, or even quadruple win in professional development? How do we make that happen?

11. How much money does the board chair's organization spend per person on professional development for ...
  - Line staff?
  - "Up and comers"?
  - Director/VP level executives?
  - C-suite executives?
12. Answer the same question as above, but sub in "the most successful organization in the board chair's industry."
13. What other questions belong here? How would we answer them?
14. What insights have we had, if any, as we've answered these questions?
15. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
16. What's our next step?

## Further Learning

John Fulwider. *Making Rock Stars for Mission Impact*. Workbook, available from the author by request.

Rusty Morgen Stahl. "Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance." *The Foundation Review* 5:3, 2013.

# Salaries and Benefits

## Perspectives to Consider

The nonprofit sector survives because it has a self-exploiting workforce: Wind it up and it will do more with less until it just runs out. But at some point, the spring must break.  
—Paul Light, *Sustaining Nonprofit Performance: The Case for Capacity Building and the Evidence to Support It*.

Half of social-justice nonprofits do not offer retirement plans to their own employees ... creating economic inequality in the very groups that fight for equality.  
—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

To the Nonprofits of America:

We write to ask for your help to end the Overhead Myth—the false conception that financial ratios are a proxy for overall nonprofit performance. Last year we wrote a letter to the donors of America asking them to consider the results (especially outcomes and impact) created by nonprofits, and to not judge you solely on percent of charity expenses that go to administrative and fundraising costs. While overhead can help us identify cases of fraud or gross mismanagement and serve as a part of an organization’s dashboard of financial management metrics, it tells us nothing about the results of your work (i.e., how you meet your mission).

Art Taylor, President, BBB Wise Giving Alliance

Jacob Harold, President & CEO, GuideStar USA

Ken Berger, President & CEO, Charity Navigator

Our sector is sustained by idealists who chose to do this work, who will work for much lower salaries than they could get elsewhere. Young people, especially, who for a while can exist with a small salary, subsisting on ramen and leftover water crackers from community events. I was there. It was kind of romantic, like being a starving artist or a small business owner who makes organic artisanal pickles. But then we do-gooders get older and start thinking about having a family. We start pining for things like a decent used car with brakes and mufflers that actually work.

Our field loses too many talented staff because we are mired in this mentality of scrappiness.

—Vu Le, “All right, you guys, we need to talk about nonprofit salaries.” nonprofitwithballs.com

I act for free, but I demand a huge salary as compensation for all the annoyance of being a public personality. In that sense, I earn every dime I make.

—Michelle Pfeiffer, actress

Nonprofit jobs—the hours are long, but the pay is low.  
—An old, tired joke

With below-market salaries an accepted norm at nonprofits, professional development substitutes as a major opportunity to both enhance and recognize performance. Therefore, the dearth of training and education opportunities provided by many organizations is a major impediment to morale, productivity, and retention.

—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

## Ask Your Partner ...

1. Which of our employees qualify for our programs and services, or those of other nonprofits in our community, because of their low incomes?
2. What needs to change about our salaries to free every employee from worry about basic needs?
3. What kind of talent could we attract with higher salaries?
4. What would that talent allow us to accomplish for the mission and the people we serve?
5. How do our salaries compare to those of the board chair’s organization?
6. How do our salaries compare to similar organizations in the nonprofit sector?
7. How do our salaries compare to similar organizations in the private sector?
8. How do our salaries compare to similar organizations in the public sector?
9. How do our benefits compare to those of the board chair’s organization?
10. How do our benefits compare to similar organizations in the nonprofit sector?
11. How do our benefits compare to similar organizations in the private sector?
12. How do our benefits compare to similar organizations in the public sector?
13. What are the benefits we offer that are hard to value in dollar terms?
14. What ideas and lessons can we import from ...
  - Nonprofits listed in *The NonProfit Times*’ Best Nonprofits to Work For?
  - Companies listed in *Fortune*’s 100 Best Companies to Work For? (Numbers 18, 19, 24, and 25 are nonprofits!)
  - The board chair’s organization and industry?
15. What did we learn the last time we looked at state-level nonprofit salary comparison data from our state nonprofit association?
16. What did we learn the last time we looked at national-level nonprofit salary comparison data from *The NonProfit Times*?
17. What are we hearing in the community about the chief executive’s salary?
18. Bottom line: How well are we treating our people when it comes to salaries and benefits?
19. When someone criticizes our overhead spending, what will we say?
20. What other questions belong here? How would we answer them?
21. What insights have we had, if any, as we’ve answered these questions?

22. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
23. What's our next step?

## Further Learning

Ann Goggins Gregory & Don Howard. "The Nonprofit Starvation Cycle." *Stanford Social Innovation Review*, Fall 2009.

Our research reveals that a vicious cycle fuels the persistent underfunding of overhead. The first step in the cycle is funders' unrealistic expectations about how much it costs to run a nonprofit. At the second step, nonprofits feel pressure to conform to funders' unrealistic expectations. At the third step, nonprofits respond to this pressure in two ways: They spend too little on overhead, and they underreport their expenditures on tax forms and in fundraising materials. This underspending and underreporting in turn perpetuates funders' unrealistic expectations. Over time, funders expect grantees to do more and more with less and less—a cycle that slowly starves nonprofits.

Pablo Eisenberg. "Why Nonprofit Workers Should Get Sabbaticals." *The Chronicle of Philanthropy*, May 4, 1995.

The large majority of nonprofits cannot provide financial compensation nearly as substantial as those offered by the professions, or even local government. Low pay, long hours, poor benefits, persistent crises, struggles for institutional survival, personal strain, and "burnout" are common ingredients of life in much of the nonprofit world.

Sabbaticals are benefits that offer opportunities for rest and relief, a time to think, a chance to pursue other interests. They make our jobs more attractive and bearable, and bind us more closely to the institutions for which we work.

Rusty Morgen Stahl, "Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance." *The Foundation Review* 5:3, 2013.

Paul Light, *Sustaining Nonprofit Performance: The Case for Capacity Building and the Evidence to Support It*. Brookings Institution, 2004.

# Board Culture

## Perspectives to Consider

In my forty-plus years of experience in the for-profit and nonprofit sectors, I have come to see that there's a common denominator among organizations that manage to outcomes successfully: They all have courageous leaders who foster a performance culture.

—Mario Morino, *Leap of Reason: Managing to Outcomes in an Era of Scarcity*.

I've become absolutely convinced that the seminal difference between successful companies and mediocre or unsuccessful ones has little, if anything, to do with what they know or how smart they are; it has everything to do with how healthy they are.

—Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business*.

## Ask Your Partner ...

1. What are our board's nonnegotiable values?
2. How does our board culture reflect the values we publicly claim, and work to advance through our mission?
3. How does our board culture fail to reflect the values we publicly claim, and work to advance through our mission?
4. What observable behaviors reflect the kind of board culture we want?
5. What about our board culture is working well?
6. What about our board culture is not working well?
7. What needs to change about our board's culture to make the board more effective?
8. What needs to change about our board's culture to make board service more enjoyable?
9. What needs to change about our board's culture to make our board more attractive to people we recruit?
10. What are the disconnects between our board culture and staff culture?
11. What about our board would make you hesitant to rejoin it?
12. What about our board would make you jump at the chance to rejoin it?
13. How do we need to raise our expectations of the board?
14. What other questions belong here? How would we answer them?
15. What insights have we had, if any, as we've answered these questions?
16. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?



- Our constituents?
- External stakeholders?

17. What's our next step?

## Further Learning

Jim Collins. *Good to Great: Why Some Companies Make the Leap...And Others Don't*. HarperBusiness, 2001.

Jim Collins. *Good to Great and the Social Sectors: A Monograph to Accompany Good to Great*. HarperCollins, 2005.

Patrick Lencioni. *The Advantage: Why Organizational Health Trumps Everything Else in Business*. Jossey-Bass, 2012.

Mario Morino. *Leap of Reason: Managing to Outcomes in an Era of Scarcity*. Venture Philanthropy Partners, 2011.

# Staff Culture

## Perspectives to Consider

In my forty-plus years of experience in the for-profit and nonprofit sectors, I have come to see that there's a common denominator among organizations that manage to outcomes successfully: They all have courageous leaders who foster a performance culture.

—Mario Morino, *Leap of Reason: Managing to Outcomes in an Era of Scarcity*.

I've become absolutely convinced that the seminal difference between successful companies and mediocre or unsuccessful ones has little, if anything, to do with what they know or how smart they are; it has everything to do with how healthy they are.

—Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business*.

## Ask Your Partner ...

1. What are our staff's nonnegotiable values?
2. What observable behaviors reflect the kind of staff culture we want?
3. How does our staff culture reflect the values we publicly claim, and work to advance through our mission?
4. How does our staff culture fail to reflect the values we publicly claim, and work to advance through our mission?
5. What about our staff culture is working well?
6. What about our staff culture is not working well?
7. What needs to change about our staff's culture to make the staff more effective?
8. What needs to change about our staff's culture to make working here more enjoyable?
9. What needs to change about our staff's culture to make our workplace more attractive to people we recruit?
10. What are the disconnects between our staff culture and board culture?
11. What's good about the culture at your organization?
12. What about our staff would make you hesitant to rejoin it?
13. What about our staff would make you jump at the chance to rejoin it?
14. How do we need to raise our expectations of the staff?
15. What other questions belong here? How would we answer them?
16. What insights have we had, if any, as we've answered these questions?
17. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?

- The line staff?
- Our constituents?
- External stakeholders?

18. What's our next step?

## Further Learning

Jim Collins. *Good to Great: Why Some Companies Make the Leap...And Others Don't*. HarperBusiness, 2001.

Jim Collins. *Good to Great and the Social Sectors: A Monograph to Accompany Good to Great*. HarperCollins, 2005.

Patrick Lencioni. *The Advantage: Why Organizational Health Trumps Everything Else in Business*. Jossey-Bass, 2012.

Mario Morino. *Leap of Reason: Managing to Outcomes in an Era of Scarcity*. Venture Philanthropy Partners, 2011.

# Board Engagement

## Perspectives to Consider

What some board members tell me, when pushed, is that they tolerate things on a nonprofit board that they wouldn't stand for in their day jobs. The boards don't ensure that the organization has a sound strategy, they tolerate mediocrity in management, they don't hold the organization accountable for results, and they don't ensure that resources are adequate to accomplish goals. The president of a very large community foundation went so far as to tell me that "the overwhelming majority of boards in this region are broken." He was characterizing the governance of more than 7,000 nonprofits. —David Simms, "A Nonprofit Board or a Group of Dead Fish?" *Harvard Business Review*.

## Ask Your Partner ...

1. What behaviors do we look for to know our board's engaged?
2. How are you, the board chair, leading by example?
3. How are you, the board chair, setting expectations and when necessary enforcing them?
4. How are you, the chief executive, ensuring the board gets the support it needs to stay engaged?
5. What does greater board engagement make possible for ...
  - Revenue development?
  - Board recruitment?
  - Public relations?
  - Meeting community needs?
  - Transparency and compliance?
  - Supporting the chief executive?
6. What other questions belong here? How would we answer them?
7. What insights have we had, if any, as we've answered these questions?
8. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
9. What's our next step?

# Board Recruitment

## Perspectives to Consider

While the business world is obsessed with understanding and responding to Millennials, our sector is doing little to engage this impressive generation in leadership.

—Robert B. Acton, executive director NYC, Taproot Foundation

## Ask Your Partner ...

1. What are we doing to retain the members we have?
2. What leadership capabilities do we require so you, the board chair, become less critical to our success, and so other people can take on more significant leadership roles?
3. What are the qualities and skills this organization will need in its board one year from now? Three years? Five?
4. How can we make/keep our board one of this community's "A" boards—one people get in line to join?
5. What do we need to change about the leadership quality and skill expectations we have of prospective members?
6. What can we change about the nominating process to ensure a deeper leadership bench?
7. What can we change about the board's culture so we attract and retain the right kind of people?
8. What other questions belong here? How would we answer them?
9. What insights have we had, if any, as we've answered these questions?
10. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
11. What's our next step?

## Further Learning

Joan Garry. "How to Select First Rate Board Members." [joangarry.com](http://joangarry.com)

If you ask me, the single biggest problem with interviewing board candidates is that they are not interviews at all. Candidates come to "interviews" assuming that the job is theirs if they want it. The committee sells and persuades and typically does not vet the

candidate in any substantive way. And real discussions about the fundraising obligation are swept under the rug for fear of chasing a good prospect away.

Come on folks. Can we please remember that board service is a privilege? That working on behalf of your organization is a gift. That public service is core to the betterment of our society.

I'd say "man up," but that would be sexist.

Alice Korngold. "Nonprofit Board-Matching: The Good, the Bad, and the Ugly." *Fast Company*, fastcompany.com

Nightmare: You wound up on a nonprofit board that's not a fit for you. ... This is not only a nightmare for you. It's a nightmare for the nonprofit. You're disappointed, maybe embarrassed, and not sure what to do. ... Imagine this scenario instead: Your company has a board program through which board experts train and place your firm's executives and professionals on nonprofit boards.

The Bridgespan Group. "Recruiting and Vetting Nonprofit Board Members." bridgespan.org

Read this article to get a sense of the criteria desirable boards would use to determine whether *you're* desirable as a new member.

John Fulwider. *Advancing Your Career Through Nonprofit Board Service*. NPOCEO Press, 2014.

You want to invest in your profession, the causes you care about, and yourself, but your time and energy are limited. You need one approach to amplify your effectiveness and impact in all three domains at once. Here's the approach: Strengths-based leadership on a nonprofit board. ...

Your profession, the causes you care about, and your own personal development matter. Strengths-based leadership ties them all together into a win-win-win with your leadership at the center.

Robert B. Acton. "Bench Warmers or Change Makers? It's Time to Engage the Next Generation in Board Service." *Exceptional Boards*, exceptionalboards.com

The NonProfit Times. "14 board interview questions." thenonprofittimes.com

# Chief Executive Evaluation

## Perspectives to Consider

Close, working friendships often develop, but we as board chairs need to remain independent enough to evaluate the chief executive's performance and to respond to board members who express issues or concerns. Balancing a friendly, effective relationship with frank and open communication requires a strong chair and a willing chief executive who welcomes feedback.

—Sherill K. Williams, *Building the Governance Partnership*

There are organizations out there where the chief executive officer hasn't had a review in five years. And automatically they just get their raise every year and all is good and the board doesn't interact with the other employees. They have no idea if the CEO is doing a good job or not. They may see numbers but that's all they see, they don't see how the CEO is interacting with the staff or the morale of the organization. That is a great example of a partnership not working well at all.

—Theresa Thibodeau, board chair, Big Brothers Big Sisters of the Midlands, quoted in *Better Together: How Top Nonprofit CEOs and Board Chairs Get Happy, Fall in Love, and Change Their World*

## Ask Your Partner ...

1. What are the board's expectations of the chief executive?
2. What are the key performance indicators that show the chief executive is meeting or exceeding expectations?
3. What does the board chair think of the chief executive's performance?
4. What do key factions on the board, if any, think of the chief executive's performance?
5. What does the rest of the board think of the chief executive's performance?
6. What does the leadership team think of the chief executive's performance?
7. What does the rest of the staff think of the chief executive's performance?
8. What do funders think of the chief executive's performance?
9. What do constituents think of the chief executive's performance?
10. What do other external stakeholders think of the chief executive's performance?
11. What other questions belong here? How would we answer them?
12. What insights have we had, if any, as we've answered these questions?
13. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?

- Our constituents?
- External stakeholders?

14. What's our next step?



# Board Chair and Board Evaluation

## Perspectives to Consider

Board development is not top priority. All of a sudden two weeks before the annual meeting you're hustling around trying to get a nominating committee. Ellen's constantly saying, "Well, here's a potential board member, let's put him or her on our maybe list," and she's thinking year round. Those organizations that don't have board development as an ongoing priority are really going to struggle.

—Mike Parks, president, The Dayton Foundation, quoted in *Better Together: How Top Nonprofit CEOs and Board Chairs Get Happy, Fall in Love, and Change Their World*

## Ask Your Partner ...

1. What are the chief executive's expectations of the board chair?
2. What are the chief executive's expectations of the rest of the board?
3. What are the board chair's expectations of the board?
4. What are the key performance indicators that show the board chair is meeting or exceeding expectations?
5. What are the key performance indicators that show the rest of the board is meeting or exceeding expectations?
6. What does the chief executive think of the board chair's performance?
7. What does the chief executive think of the rest of the board's performance?
8. What does the board think of its own performance?
9. What does the leadership team think of the board's performance?
10. What does the rest of the staff think of the board's performance?
11. What do funders think of the board's performance?
12. What do customers think of the board's performance?
13. What do other external stakeholders think of the board's performance?
14. What other questions belong here? How would we answer them?
15. What insights have we had, if any, as we've answered these questions?
16. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
17. What's our next step?

## 6. Conversation Starters: Programs

1. Mission and Vision
2. Meeting Community Needs
3. Sustainability
4. Revenue Development
5. Business Model
6. External Threats
7. Internal Threats

These are designed to be standalone printouts of one to three pages. You'll see replication. I don't want you to have to cross-reference and shuffle papers when the two of you invest critical time in your most important relationship.

# Mission and Vision

## Perspectives to Consider

As investors in impact, we—the Mulago Foundation—don’t want to wade through a bunch of verbiage about “empowerment,” “capacity-building,” and “sustainability”—we want to know exactly you’re trying to accomplish. We want to cut to the chase, and the tool that works for us is the eight-word mission statement. All we want is this: A verb, a target population, and an outcome that implies something to measure—and we want in eight words or less.

—Kevin Starr, “The Eight-Word Mission Statement.” *Stanford Social Innovation Review*

A small body of determined spirits fired by an unquenchable faith in their mission can alter the course of history.

—Mahatma Gandhi

A mission statement is not something you write overnight... But fundamentally, your mission statement becomes your constitution, the solid expression of your vision and values. It becomes the criterion by which you measure everything else in your life.

—Stephen Covey

Outstanding people have one thing in common: An absolute sense of mission.

—Zig Ziglar

The mission is what you do to change the world. The vision is the changed world that results from your mission efforts, combined with those of other people and organizations in the public, private, and nonprofit sectors.

## Ask Your Partner ...

1. How do each of us define the *term* mission?
2. When each of us tells average people what our organization does, what do we say?
3. Does our mission statement contain a verb, a target population, and an outcome that implies something to measure?
4. How should we change/expand/contract our mission, if at all?
5. How do each of us define the *term* vision?
6. When each of us tells average people what our organization is striving to achieve, what do we say?
7. How should we change/expand/contract our vision, if at all?
8. What big problems should we be trying to solve?

9. What specifically should we do to solve the problems we reference in our vision?
10. What do we do better than any other organization one year from now? Three years? Five?
11. What are we famous for one year from now? Three years? Five?
12. What is unique about the way in which we work one year from now? Three years? Five?
13. Where do we operate one year from now? Three years? Five? At the local, state, regional, national, or international level?
14. What processes, technology, expertise, people, and systems are we using to achieve our mission one year from now? Three years? Five?
15. What key milestones have we reached to achieve our mission one year from now? Three years? Five?
16. What major achievements did we celebrate along the way?
17. What other questions belong here? How would we answer them?
18. What insights have we had, if any, as we've answered these questions?
19. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
20. What's our next step?

# Meeting Community Needs

## Perspectives to Consider

Public and nonprofit organizations are *externally justified*. This means that they are chartered by the state to pursue certain public purposes, and their legitimacy is conferred by the broader society. These organizations must find ways to show that their operations do indeed create public value, or they risk losing the social justification for their existence, legitimacy, and any tax-exempt status they have.

—John M. Bryson. *Strategic Planning for Public and Nonprofit Organizations*, Third Edition.

Calling your organization a Nonprofit focuses the world's attention on a particular inconsequential aspect of your being—the financial means that allow your work to be accomplished.

Calling your organization a Community Benefit Organization declares to the world your primary purpose—to provide benefit to the community.

—Hildy Gottlieb, “6 Reasons to Use the Term “Community Benefit Organization.”

The value of your solutions goes beyond the straightforward transactional value of who pays and who receives the benefit, whether that is the same stakeholder group or not. The value of your solutions also speaks to your outcomes, your impacts, and your conceptual value to society.

—Sarai Johnson, *Strategic Planning That Actually Works: A Step-By-Step Guide to Get it Done Faster, Cheaper, and Better Than Ever*.

## Ask Your Partner ...

1. What does our community need from us?
2. What are we doing now to provide what our community needs?
3. What are we not doing now, but need to start doing, to provide what our community needs?
4. What problems are we solving for our constituents one year from now? Three? Five?
5. What products and services do we provide one year from now? Three? Five?
6. Which types of constituents do we serve one year from now? Three? Five?
7. What value do we provide for these constituents one year from now? Three? Five?
8. Which types of constituents do we not serve one year from now? Three? Five?
9. What other questions belong here? How would we answer them?
10. What insights have we had, if any, as we've answered these questions?
11. How should we sharpen our thinking with input from ...
  - The rest of the board?

- The leadership team?
- The line staff?
- Our constituents?
- External stakeholders?

12. What's our next step?

# Sustainability

## Perspectives to Consider

The concept of sustainability is ubiquitous, overbearing, and frustrating .... Many funders and business people seem to believe that if nonprofits just try hard enough, they'll reach this state of funding Nirvana and be self-sufficient and "sustainable." And if they're not actively working toward reaching fiscal enlightenment, they shouldn't be supported.

Here's the issue: This magical land of nonprofit financial self-sufficiency does not exist, and funders' and donors' unwillingness to admit this perpetuates an inefficient funding system that stymies us nonprofits' abilities to tackle society's most challenging problems.

—Vu Le, "Can we all just admit there is no such thing as nonprofit sustainability?"

Sustainability encompasses both financial sustainability (the ability to generate resources to meet the needs of the present without compromising the future) and programmatic sustainability (the ability to develop, mature, and cycle out programs to be responsive to constituencies over time).

Sustainability is an *orientation*, not a destination. Sometimes the phrase "sustainable business model" sounds as if it refers to a place that, once reached, will allow the organization to generate financial resources on an ongoing basis while the board and staff sit back, relax, and watch it happen. But what is sustainable today may be unsustainable tomorrow. Funding streams dry up or shift focus; programmatic practices evolve; client populations change. We never arrive at a mix of programs and revenue streams that can be described as permanently sustainable. But we can always be heading in the right direction.

—Jeanne Bell, Jan Masaoka, and Steve Zimmerman. *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*

## Ask Your Partner ...

1. What do we need to change about our sources of revenue to make our organization more sustainable?
2. What do we need to change about our board to make our organization more sustainable?
3. What do we need to change about our staff to make our organization more sustainable?
4. What do we need to change about our business processes to make our organization more sustainable?
5. What do we need to change about our programs to make our organization more sustainable?
6. What changes do you see that will affect our current and future revenue?

7. What revenue sources are on the rise?
8. What revenue sources are decreasing?
9. What other questions belong here? How would we answer them?
10. What insights have we had, if any, as we've answered these questions?
11. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
12. What's our next step?

## Further Learning

Jeanne Bell and Marla Cornelius. *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. CompassPoint and the Evelyn and Walter Haas Jr. Fund, 2013.

Vu Le, "Can we all just admit there is no such thing as nonprofit sustainability?" nonprofitwithballs.com

Jeanne Bell, Jan Masaoka and Steve Zimmerman. *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*. Jossey-Bass, 2010.



# Revenue Development

## Perspectives to Consider

Development experts have long cautioned that having a skilled development director is not enough. Beyond creating a development director position and hiring someone who is qualified for the job, organizations and their leaders need to build the capacity, the systems, and the culture to support fundraising success. Among the signs that an organization is up to the task:

- It invests in its fundraising capacity and in the technologies and other fund development systems it needs;
- The staff, the executive director, and the board are deeply engaged in fundraising as ambassadors and in many cases as solicitors;
- Fund development and philanthropy are understood and valued across the organization; and
- The development director is viewed as a key leader and partner in the organization and is integrally involved in organizational planning and strategy.

All of these are widely accepted indicators that an organization is doing what's needed, and yet our survey results indicate that many nonprofits haven't created the conditions for fundraising success.

—Jeanne Bell and Marla Cornelius. *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*.

A poverty mentality is a belief that money should not be spent on internal investment unless the need is urgent, opportunities are limited by capacity, improvement is always incremental, we should do more with less, and we don't deserve the best, fastest, or most efficient path to success. It is based on fear of failure and a misguided belief that maintaining a Spartan operation equates to delivering value for grantees and communities.

An abundance mentality is a belief that internal investment is important, opportunities are a reason to grow capacity, advances can be made in leaps and bounds, success can be replicated and improved, we can handle most situations and challenges (or bounce back quickly), and we deserve to make investments in order to realize the greatest outcomes. This mentality is based on the belief that the more you put into life, the more you get out of it.

Interestingly, I don't believe the poverty or abundance mentality really have much to do with money. Instead, it has everything to do with attitude and outlook. If you think small, you will act small, and your results will be small.

—Kris Putnam-Walkerly, "Do You Have a Poverty or Abundance Mentality?"

Repeat after me: Revenue development is a programmatic initiative. Don't separate programs from the money to fund them—even better, from the money they generate.

## Ask Your Partner ...

1. What's working well with our revenue development programs?
2. What's not working well with our revenue development programs?
3. What would we do with 10 percent more revenue? 25 percent? 50 percent?
4. What opportunities are there to enhance our revenue development programs?
5. What opportunities are there to launch new revenue development initiatives?
6. What do we need to change about our people to enhance revenue development?
7. What do we need to change about our processes to enhance revenue development?
8. What do we need to change about our programs to enhance revenue development?
9. What other questions belong here? How would we answer them?
10. What insights have we had, if any, as we've answered these questions?
11. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
12. What's our next step?

## Further Learning

Jeanne Bell and Marla Cornelius. *Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. CompassPoint and the Evelyn and Walter Haas Jr. Fund, 2013.

Joan Garry. "Interview Questions for Development Directors." [joangarry.com](http://joangarry.com)

- 7) How would you describe the ideal relationship between the lead fundraiser and the Executive Director?

# Business Model

## Perspectives to Consider

Although there is no definitive list of corporate business models, there is enough agreement about what they mean that investors and executives alike can engage in sophisticated conversations about any given company's strategy. When a person says that a company is a "low-cost provider" or a "fast follower," the main outlines of how that company operates are pretty clear. Similarly, stating that a company is using "the razor and the razor blade" model describes a type of ongoing customer relationship that applies far beyond shaving products.

The value of such shorthand is that it allows business leaders to articulate quickly and clearly how they will succeed in the marketplace, and it allows investors to quiz executives more easily about how they intend to make money. This back-and-forth increases the odds that businesses will succeed, investors will make money, and everyone will learn more from their experiences.

The nonprofit world rarely engages in equally clear and succinct conversations about an organization's long-term funding strategy. That is because the different types of funding that fuel nonprofits have never been clearly defined. More than a poverty of language, this represents—and results in—a poverty of understanding and clear thinking.

—William Landes Foster, Peter Kim, and Barbara Christiansen, "Ten Nonprofit Funding Models." *Stanford Social Innovation Review*.

Nonprofit is a tax designation, not a business model.

## Ask Your Partner ...

1. What do we need to change about resources allocated to and priorities for our lines of business?
2. What do we need to change about whom we serve?
3. What do we need to change about how we serve them (with what programs/services)?
4. What do we need to change about where we provide our services?
5. What do we need to change about what sources of revenue we rely on to fund our work?
6. What are we giving away that we could charge for?
7. What proprietary processes or intellectual property have we created that we could license or sell to other organizations?
8. What other questions belong here? How would we answer them?
9. What insights have we had, if any, as we've answered these questions?
10. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?

- The line staff?
- Our constituents?
- External stakeholders?

11. What's our next step?

# External Threats

## Perspectives to Consider

Danger, Will Robinson, danger!  
—The Robot, *Lost in Space*

## Ask Your Partner ...

1. Who is doing a better job than we are at programming?
2. Who is doing a better job than we are with processes and systems?
3. Who has better people than we do?
4. What other organizations are serving or could serve our constituents' needs?
5. What do those organizations do better than us?
6. How are our community's needs changing?
7. How are funder priorities changing?
8. Which sources of revenue are declining?
9. Where are we irrelevant?
10. Where are we inconsequential?
11. What other questions belong here? How would we answer them?
12. What insights have we had, if any, as we've answered these questions?
13. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
14. What's our next step?

# Internal Threats

## Perspectives to Consider

Clever people are usually plugged into highly developed knowledge networks; who they know is often as important as what they know. These networks both increase their value to the organization and make them more of a flight risk.

—Rob Goffee and Gareth Jones. “Leading Clever People.” *Harvard Business Review*.

## Ask Your Partner ...

1. Who are the flight risks on our board?
2. Who are the flight risks on our staff?
3. How sustainable are our revenue streams?
4. Which of our programs is below par or failing in performance?
5. Which of our processes and systems is performing poorly or failing?
6. Which constituent segments have been most costly to serve?
7. What other questions belong here? How would we answer them?
8. What insights have we had, if any, as we’ve answered these questions?
9. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
10. What’s our next step?

# 7. Conversation Starters: Processes

1. Strategic Planning
2. Governance
3. Transparency
4. Marketing
5. Internal Communication
6. Succession Planning for the Board Chair
7. Succession Planning for the Chief Executive

These are designed to be standalone printouts of one to three pages. You'll see replication. I don't want you to have to cross-reference and shuffle papers when the two of you invest critical time in your most important relationship.

# Strategic Planning

## Perspectives to Consider

The report is the result of your planning, but only as far as getting the information to the people involved in the work goes. Your FINAL, REAL result, is the action you take on the strategy now that you have defined it. NEVER confuse the written document with the actual strategic plan. The strategic plan all comes out in the execution of said plan, and means nothing if you just sit on it and go nowhere with it.

—Sarai Johnson, *Strategic Planning That Actually Works: A Step-By-Step Guide to Get it Done Faster, Cheaper, and Better Than Ever*.

Creating strategies that are truly adaptive requires that we give up on many long-held assumptions. As the complexity of our physical and social systems make the world more unpredictable, we have to abandon our focus on predictions and shift into rapid prototyping and experimentation so that we learn quickly about what actually works. With data now ubiquitous, we have to give up our claim to expertise in data collection and move into pattern recognition so that we know what data is worth our attention. We also know that simple directives from the top are frequently neither necessary nor helpful. We instead find ways to delegate authority, get information directly from the front lines, and make decisions based on a real-time understanding of what's happening on the ground. Instead of the old approach of "making a plan and sticking to it," which led to centralized strategic planning around fixed time horizons, we believe in "setting a direction and testing to it," treating the whole organization as a team that is experimenting its way to success.

—Dana O'Donovan and Noah Rimland Flower. "The Strategic Plan is Dead. Long Live Strategy." *Stanford Social Innovation Review*.

## Ask Your Partner ...

1. How aligned is the board around the strategic plan?
2. How aligned is the leadership team around the strategic plan?
3. How aligned is the staff around the strategic plan?
4. In what ways is the board executing on the strategic plan?
5. In what ways is the leadership team executing on the strategic plan?
6. In what ways is the staff executing on the strategic plan?
7. What differences of opinion on our strategic direction do you see among different groups at this organization?
8. What board qualities and skills do we need to implement our strategic plan?
9. What leadership team qualities and skills do we need to implement our strategic plan?
10. What staff qualities and skills do we need to implement our strategic plan?



11. What other questions belong here? How would we answer them?
12. What insights have we had, if any, as we've answered these questions?
13. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
14. What's our next step?

# Governance

## Perspectives to Consider

Trustees can oversee generative work, much as they do the strategy recommendations executives present to them when they do Type II governing. Rather than create strategy, trustees question assumptions, probe feasibility, identify obstacles and opportunities, all to improve the chances for success. Similarly, boards can review and critique the generative thinking of executives: probing how they arrived at their sense of a problem or opportunity, identifying alternative ways of framing the issue, and exploring the sense of the past embedded in their proposals for the future. The point is not for trustees to displace or control staff, but to offer executives a venue to test those views with a supportive, inquisitive board.

This is, in effect, what executives do with trustees who serve as “sounding boards.” They turn to trustees, individually or as a group, for advice on “sticky” situations: an ambiguous personnel problem, a potential conflict with a donor, or an emerging conflict with public policy. The executives share their generative thinking-in-process to get guidance and assistance from trustees before the matter reaches the board for formal consideration or action.

Through these exchanges, trustees also hold executives accountable. Boards that oversee executives in Types 1 and II track the flow of tangible assets and monitor progress toward strategic goals. In Type II oversight, trustees gauge the generative thinking of executives, subjecting this powerful work to the same scrutiny boards are now expected to give to financial and strategic work.”

—Richard P. Chait, William P. Ryan, and Barbara E. Taylor. *Governance as Leadership: Reframing the Work of Nonprofit Boards*.

## Ask Your Partner ...

1. What's working with our overall governance structure?
2. What's not working with our overall governance structure?
3. What contributions to the chief executive's success does our governance *work* as a board make?
4. What contributions to the organization's success does our governance *work* as a board make?
5. What contributions to our community's success does our governance *work* as a board make?
6. How well do our governance *policies and procedures* serve the board?
7. How well do our governance *policies and procedures* serve the organization?
8. How well do our governance *policies and procedures* serve our community?
9. What would happen if we completely changed our governance structure (e.g. by adopting, or abandoning, a policy governance model)?

10. What other questions belong here? How would we answer them?
11. What insights have we had, if any, as we've answered these questions?
12. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
13. What's our next step?

# Accountability and Transparency

## Perspectives to Consider

The growing press attention to the excesses and questionable activities of nonprofits sends an unmistakably clear message: The nonprofit world must clean up its affairs, or Congress and the state legislatures will do the job for it. The question is, Can nonprofits do this by themselves?

—Pablo Eisenberg, “Press Coverage Sends a Message to Nonprofits: Clean Up Your Act.” *The Chronicle of Philanthropy*.

Publicity is justly commended as a remedy for social and industrial diseases. Sunlight is said to be the best of disinfectants; electric light the most efficient policeman.

—Louis D. Brandeis, associate justice, U.S. Supreme Court

Amid this clamor for accountability, it is tempting to accept the popular normative view that more accountability is better. But is it feasible, or even desirable, for nonprofit organizations to be accountable to everyone for everything? The challenge for leadership and management is to prioritize among competing accountability demands. This involves deciding both *to whom* and *for what* they owe accountability.

—Alnoor Ebrahim. “The Many Faces of Nonprofit Accountability.” In *The Jossey-Bass Handbook of Nonprofit Leadership and Management*.

## Ask Your Partner ...

1. How can we go above and beyond legal requirements to be completely transparent in our operations?
2. How can we involve the community in planning and decision making—even beyond having a representative board—so we ensure our community’s needs are met?
3. How can we enhance internal transparency, so the entire board and staff can see “behind the scenes”?
4. What other questions belong here? How would we answer them?
5. What insights have we had, if any, as we’ve answered these questions?
6. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
7. What’s our next step?

# Marketing

## Perspectives to Consider

Today, communications is not just an opportunity for nonprofits; it's a necessity. Whether we're fundraising or trying to influence policy, how we reach the right person with the right message has changed profoundly. Now it can take far more to figure out who the right people are, what channels to reach or influence them through, and how to hear them. It's one thing to land a grant to open a new art space; it's another to convince city hall that the community wants it, and still another to build a community to support it.

—Andrew Sherry, “The New Communications Imperative.” *Stanford Social Innovation Review*

Great marketing only makes a bad product fail faster.

—David Ogilvy, “The Father of Advertising”

## Ask Your Partner ...

1. What should our message be?
2. Who needs to hear our message?
3. Where does our message need to be?
4. How should we segment our message?
5. Looking internally, how good a job are we doing getting our message to our own board and staff?
6. What other questions belong here? How would we answer them?
7. What insights have we had, if any, as we've answered these questions?
8. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
9. What's our next step?

# Internal Communication

## Perspectives to Consider

The single biggest problem in communication is the illusion that it has taken place.  
—George Bernard Shaw, playwright, Nobel laureate

## Ask Your Partner ...

1. What's going well with communication between the chief executive and board chair?
2. What's going well with communication between the chief executive and the rest of the board?
3. What's going well with communication between the chief executive and the leadership team?
4. What's going well with communication between the chief executive and the line staff?
5. What's going well with communication between the board chair and the rest of the board?
6. What are our tallest, sturdiest silos, and how do we knock them down?
7. How can our leadership team be more available and accessible to engage in dialogue with line staff?
8. How can we facilitate improved informal communication here?
9. How can we help employees get to know one another better?
10. How can we help employees make connections that will help us break down internal boundaries?
11. What would improving the chief executive's communication skills make possible for the mission?
12. What would improving the board chair's communication skills make possible for the mission?
13. What other questions belong here? How would we answer them?
14. What insights have we had, if any, as we've answered these questions?
15. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
16. What's our next step?

# Succession Planning for the Board Chair

## Perspectives to Consider

One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it's almost a non-event when it happens.

—Anne M. Mulcahy, former chairwoman and CEO, Xerox Corp.

## Ask Your Partner ...

1. Neither of us will be here forever. What are we doing to prepare leaders below us?
2. What are the qualities the board needs in its next chair?
3. What are the skills the board needs its next chair to have?
4. What are the qualities the chief executive needs in the next chair?
5. What are the skills the chief executive needs the next chair to have?
6. What do we need to do to ensure a deep bench of qualified and credible board chair succession candidates?
7. What other questions belong here? How would we answer them?
8. What insights have we had, if any, as we've answered these questions?
9. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
10. What's our next step?

# Succession Planning for the Chief Executive

## Perspectives to Consider

Widely predicted baby boomer retirements in the nonprofit arena did not take place in the last decade. [Researchers] find that 95 percent of long-term nonprofit leaders reject the traditional “golden years” vision of retirement. Nonprofit leaders are twice as likely to reject retirement than their peers in other sectors; they wish to continue working and they have serious concerns about the sustainability of the organizations they lead.

This countertrend has created what I call a bottleneck on the nonprofit career highway .... Boomers are solidly in their lanes, merely considering various exit ramps. Generation X’ers are sitting in traffic behind them, seeking new routes. Millennials, meanwhile, are trying to join the roadway from the entrance ramps and gain speed.

—Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review*.

## Ask Your Partner ...

1. Neither of us will be here forever. What are we doing to prepare leaders below us?
2. What are the chief executive qualities and skills this organization will need one year from now? Three? Five?
3. What leadership capabilities do we require so the chief executive becomes less critical to our success, and so other people can take on more significant leadership roles?
4. What other questions belong here? How would we answer them?
5. What insights have we had, if any, as we’ve answered these questions?
6. How should we sharpen our thinking with input from ...
  - The rest of the board?
  - The leadership team?
  - The line staff?
  - Our constituents?
  - External stakeholders?
7. What’s our next step?

## Further Learning

Rusty Morgen Stahl, “Talent Philanthropy: Investing in Nonprofit People to Advance Nonprofit Performance.” *The Foundation Review* 5:3, 2013.

Tom Adams. *The Nonprofit Leadership Transition and Development Guide*. Jossey-Bass, 2010.

John Fulwider. “Does Your Organization Have ‘Solid Performers’ or Rock Stars?” Nonprofit Hub, [nonprofithub.org](http://nonprofithub.org)



## 8. Help Others Improve Their Partnerships

Changing the world really is better together.

Now that you've used this book to improve your partnership, you may feel an obligation to spread the love to others. Here are some ideas for doing that.

- Establish a vice-chair mentoring program.
- Take a planning retreat together.
- Attend a conference together.
- Buy this book for friends and colleagues.
- Conduct a training.
- Help pay for mediation services or executive coaching for leadership pairs who need the help.
- Tell your story. Celebrate a transformational partnership, as The Dayton Foundation did with prominent coverage of “The Fred and Fred Show” in its 75th anniversary report.
- Establish a capacity-building fund named after your organization's two most transformational leaders.

Grantmakers, you can be of special help:

- Establish a vice-chair mentoring program.
- Buy this book for grantees.
- Conduct a training.
- Help pay for mediation services or executive coaching for leadership pairs who need the help.
- Make partnership quality a grant requirement.
- Provide scholarships for leadership pairs to travel to conferences and retreats.
- Establish a capacity-building fund named after your organization's two most transformational leaders.

## 9. Training Outlines

1. Stimulating Discussion
2. Chief Executives with Their Board Chairs
3. Chief Executives and Board Chairs, Not Paired Together

## Option 1: Stimulating Discussion

Get together any group of senior nonprofit staff leaders and board members and ask them some of the following questions:

1. What challenges have you faced in building your own partnerships?
2. What are positive consequences you've seen from healthy partnerships?
3. What are the negative consequences you've seen from poor relationships?
4. For poor relationships ...
  - What are the effects on the mission?
  - What are the effects on the two people involved?
  - What are the effects on the rest of the board?
  - What are the effects on the leadership team?
  - What are the effects on the line staff?
  - What are the effects on fundraising?
  - What are the effects on programs?
  - What are the effects on other operational matters?
5. For healthy partnerships ...
  - What are the effects on the mission?
  - What are the effects on the two people involved?
  - What are the effects on the rest of the board?
  - What are the effects on the leadership team?
  - What are the effects on the line staff?
  - What are the effects on fundraising?
  - What are the effects on programs?
  - What are the effects on other operational matters?
6. What would be possible if there were more healthy leadership partnerships, and fewer poor relationships, in your community?
7. Where would you rank the quality of the leadership partnership in terms of capacity issues facing nonprofits in your community?

## Option 2: Chief Executives with Their Board Chairs

For a workshop pairing nonprofit chief executives with their board chairs, all you need to do is mix and match the exercises in this book. Essentially, you're giving the two leaders the luxury of focusing on their relationship in a supportive environment for 90 minutes to a half day, depending on the length of your workshop.

If you have an audience that's more inclined toward a quick, concrete win, you might do the exercises from Chapter 4 in this order:

1. Exercise: Prepare for the Next Board Meeting
2. Exercise: Set Up the Meetings
3. Exercise: Owner's Manual

If your audience seems ready to think long-term, you might try this order:

1. Accomplishment Agenda (from Chapter 2)
2. Exercise: Set Up the Meetings
3. Exercise: Shared Language

If you've got an audience that will tolerate getting up and moving around and want a pretty snazzy exercise focusing on expectations, try a Q-sort exercise:

1. Print up index cards with all the expectations from Fisher Howe's book listed in Chapter 4, and add items from roles and responsibilities lists in the BoardSource books *Ten Basic Responsibilities of Nonprofit Boards, Second Edition* and *The Nonprofit Chief Executive's Ten Basic Responsibilities, Second Edition*.
2. Have participants sort them into chief executive, board chair, and shared columns.
3. If you've got a lot of time and space, have the board chairs and chief executives sort their cards separately at first, then compare their results. Now *that* will prompt some interesting discussion.

## Option 3: Chief Executives and Board Chairs, Not Paired Together

With a mixed group of nonprofit chief executives and board chairs, most of whom are not each other's leadership partner, you can facilitate a stimulating discussion where chief executives learn from board chairs' perspectives, and vice versa.

For some of the questions, you may want to create chief executive-only and board chair-only breakout groups to foster more openness, and then have each group report out high-level conclusions to the other group.

1. What should chief executives know about the board chair's perspective?
2. What should board chairs know about the chief executive's perspective?
3. What are challenges unique to the chief executive's role that the board chair should know about?
4. What are challenges unique to the board chair's role that the board chair should know about?
5. What are best practices regarding chief executive-board chair relationships we can import from the private sector?
6. What are practices that cannot be imported?
7. What advice would you give to a fellow chief executive caught in a bad relationship?
8. From your perspective as a chief executive, what advice would you give to a board chair (other than your own) caught in a bad relationship?
9. What advice would you give to a fellow board chair caught in a bad relationship?
10. From your perspective as a board chair, what advice would you give to a chief executive (other than your own) caught in a bad relationship?
11. What are relationship issues that you see commonly come up?

# **Shameless Self-Promotion**

# 10. Partnership Jumpstart

Sometimes you need just a little help to get started—in a new exercise program, or a new leadership partnership. Think about the personal training appointment they set you up with when you join the gym. You get an introduction to the machines, and some custom tips on how you, personally, can best get fit. Most importantly, you commit and show up because you made an appointment.

Same idea with starting a new leadership partnership, say with a board chair just starting her or his term. Make an appointment with me for a 45-minute facilitated conversation, by phone, to get the chief executive and the board chair talking about the critical issues that will improve their working relationship, increase each person's effectiveness, and deliver more impact for the mission.

I'll ask you both five to 10 powerful, probing coaching questions (which you'll have in advance), and at the end offer some observations from my experience about how you might focus your time together.

After that, two smart, talented, high-achieving people like you will be good to go.

Learn more by calling me at (402) 608-1608 or writing:  
[john@johnfulwider.com](mailto:john@johnfulwider.com).

# 11. Better Together: The Main Book

The 145-page main book *Better Together: How Top Nonprofit CEOs and Board Chairs Get Happy, Fall in Love, and Change Their World* answers the “why” and “what” questions about nonprofit chief executive-board chair partnerships: Why do they matter, and what can I do about them?

## **Chapter 1: Tour of Duty, or Transformational Change?**

A controllable factor helps or hinders accomplishing the mission: The quality of the relationship between the CEO and board chair. Even if your partnership’s great, this controllable factor likely holds back a cause you care about.

## **Chapter 2: Why Happiness and Love Matter**

Happiness isn’t “soft,” it’s key to the executive’s engagement and performance, and then to mission impact. The best leadership partners can actually fall in love, in the Greek *philia* sense: Other-regarding, friendship love.

## **Chapter 3: Why Leadership Partnerships Matter**

The positive effects of happy, healthy partnerships on the leaders themselves, as well as on program work, board and staff engagement, and fundraising performance.

## **Chapter 4: How Leadership Partnerships Work Best**

A three-keys approach informed by people just like you—executives and board chairs I interviewed, mostly in pairs together. A simple five-level model to describe how CEOs and board chairs feel, and what they accomplish for the mission, when they go from poor relationships to transformational partnerships.

Order **Better Together** at: [bettertogetherleadership.com](http://bettertogetherleadership.com)



## 12. Help Me Improve the 2nd Edition

In my academic career as a political scientist I presented work like this at academic conferences, often in front of considerably more accomplished scholars—some of whose work I had built on in my own research paper.

At academic conferences I liked to call my own fouls by identifying gaps in the manuscript.

I would *love* your help filling the gaps I see in this book, so I can improve the second edition. Please call me at (402) 608-1608 or write [john@johnfulwider.com](mailto:john@johnfulwider.com) with any connections to interviewees, citations to complementary research I didn't include, and anything else you think would make the next edition better.

The gaps I see in *Better Together* are:

1. **Support and mentoring:** Several of my interviewees describe having one- or two-way support and mentoring relationships with their leadership partners. But the book needs more and more detailed stories about, and more practical how-to material on support and mentoring.
2. **OK, good, and great partnership examples:** I have stories of poor partnerships, and transformational partnerships, but nothing explicit in the middle at the OK, good, and great levels.
3. **The story of a poor relationship, told by both sides:** I've got a one-sided poor relationship story. I'd love to have both parties in a poor relationship talk candidly about what went wrong—especially if the relationship dysfunction had big, interesting consequences. (There was a well-publicized CEO-board chair blowup at the University of Nebraska Foundation, for example.)
4. **Case study geographical diversity:** Five of my seven case studies are Nebraska organizations.
5. **Case study racial diversity:** None of my interviewees are people of color.
6. **Case study mission diversity:** I have community development, youth mentoring, community sustainability, children's zoo, and community foundation mission types. I'd like arts, culture & humanities, education, health, international/foreign affairs, social justice. An international NGO would be nice. A social enterprise would be fascinating, as would a hospital or hospital system.
7. **Case study organization size diversity:** All but two of my case studies are of small organizations.
8. **Case study scale diversity:** I have community-level organizations only. I'd like a national-level and international-level organization.

# 13. Services for Nonprofits

When I'm not writing books I consult with and coach nonprofit leaders. My special areas of expertise are executive coaching in general; as well as strategic planning, team building, and internal communication.

Learn more by calling me at (402) 608-1608 or writing:  
[john@johnfulwider.com](mailto:john@johnfulwider.com).

## Executive Coaching

I'm like a personal trainer, except I make your brain rather than your body sweat. You get clarity and confidence about your best next actions to accomplish your personal and professional goals. I mostly ask you powerful, probing questions that uncover the answers already in your head, . I offer my own observations and recommend quick learning resources when appropriate.

Executive coaching is the fastest way to reach your goals. You're a smart, accomplished person and could gut it out on your own. But if you're impatient with the pace of change, I can help.

## Testimonials

I step away from our coaching conversations and I have two things: Very clear next steps, but also the clarity of mind to see, "Oh, here is how I'm going to do that." This gives me enormous confidence to move forward.

**Ines Polonius**

CEO, Communities Unlimited

John helps me bring all the pieces into conscious focus and get there faster.

**Nancy Straw**

President, West Central Initiative

John quickly helped me distill our many programs into one clear message, with a direct call to action, that won more friends for our agency from my audiences.

**Ingrid Kirst**

Executive Director, Community CROPS

John is like a second brain for me.

**Mike Renken**

CEO, NeighborWorks Lincoln

## Frequently Asked Questions about Coaching

### What is coaching?

Here's how Grantmakers for Effective Organizations and CompassPoint Nonprofit Services define it:

[A] process that supports individuals to make more conscious decisions and take more effective action. ... [T]he coach's principal job is not to tell leaders what to do but to help them figure out the best approaches to the challenges and opportunities associated with leading their organizations.

### When is coaching most valuable in the nonprofit sector?

Short answer: There's a growth opportunity.

Longer answer:

- An executive transition is in progress or being contemplated.
- The organization is embarking on a new mission or strategic plan.
- The organization is undergoing an expansion in programs or funds.
- It can catalyze (reinforce, multiply) other leadership and organizational capacity-building efforts.

### Isn't coaching too expensive?

No. It's a tiny, tiny percentage of most organizations' existing operating costs.

Concerns about the costs of coaching largely ignore that these costs can be nominal in relation to overall nonprofit budgets, and even in relation to the overall compensation packages of most nonprofit leaders. Cost concerns also ignore the return on investment that can come from coaching, which can be considerable.

### Doesn't coaching lead to attrition (coached leaders leave the organization)?

Sometimes, but too bad. It's good for the organization's mission and the nonprofit sector to develop leaders.

[I]t is important to view coaching as an investment in not just the leadership of a specific nonprofit organization but in the sector's overall leadership. If an individual decides to leave an organization because it is not a good match, grantmakers could view this as a success rather than a failure of coaching—especially if the leader stays in the sector and is able to apply newly acquired skills and capacities to the work of another organization. It could also be good for the organization or movement if the leader leaves in part because he or she is too burned out, or has lost energy and passion.

## How many grantmakers are supporting coaching?

In GEO's 2008 survey of grantmakers, fewer than half (44 percent) said they had supported leadership development activities in the previous two years. The level of support declined for smaller grantmakers, with just one in four foundations with assets of \$10 million or less saying they had provided leadership development support.

Yet 52% of North American private sector companies use coaching, at an investment of \$1 billion a year. Twenty-five percent of nonprofit leaders use a coach. What do they know that grantmakers don't?

**Source of the above quotations:** *Coaching and Philanthropy: An Action Guide for Grantmakers* by Grantmakers for Effective Organizations and CompassPoint Nonprofit Services, with funding from W.K. Kellogg Foundation, The Harnisch Foundation, The James Irvine Foundation, the David and Lucile Packard Foundation, and the Evelyn and Walter Haas, Jr. Fund.

## Strategic Planning

I help nonprofit executives get clarity and engagement from their boards and leadership teams through enjoyable strategic planning and execution support. I use interviews to get the strategic conversation started well before the retreat itself. A custom strategic planning retreat is enjoyable and productive for everyone in no small part because they've been involved in setting the agenda. (And because I have strict requirements regarding the quality of the coffee and snacks.) I coach the planning team through implementation afterward so the plan actually gets executed.

## Benefits

- **Clarity:** "I know what everybody's thinking. I don't have to be guessing."
- **Engagement:** "This gives us a very concrete way of getting the board and leadership team to work together."

## Testimonials

We gained tremendous insight about the future of alt.Consulting. **Herman Strickland** Board chairman, alt.Consulting

The session John led was facilitation at its best. A relaxed, entertaining, and insightful process incorporating a comprehensive review of alt's status, and resulting in a good outline of work to achieve. And, we finished on time. **Wayne Fawbush** Board member, alt.Consulting Former program officer, The Ford Foundation

## **Team Building**

I help nonprofit chief executives get their leadership teams and boards rowing in the same direction. I fit assessments and preparatory reading to your team's precise needs using coaching questions and interviews. A custom team building retreat is enjoyable and productive for everyone in no small part because they've been involved designing it. (And because I have strict requirements regarding the quality of the coffee and snacks.) Because team building improvements require disciplined, consistent execution, I coach the team through implementation so positive new habits stick and negative old habits don't.

## **Internal Communication**

I help nonprofit executives get clarity on what to say, to whom, in what order to get their strategic visions moving in their organizations. My clients sharpen their existing skills in making everyday conversations strategic, and mounting influence and inspiration campaigns. The result: Their leadership teams and boards row in the same direction, and important things get done.

# 14. Speaking Topics

Here are conference program-ready summaries of talks I have “in the can.” I can, of course, customize a workshop for your exact needs.

My talks are always in workshop format and action-oriented. The focus is on introducing and immediately practicing with a new toolkit for getting results as a nonprofit executive. The practice usually comes in the form of small- and large-group facilitated activities. The outcome is one new practice each audience member can put in place in the next 30 days to drive more mission impact and job satisfaction. Every workshop comes with a 75-150 page book that helps audience members make the new practice a permanent part of their leadership.

I’ve formatted my talks successfully as:

- Conference plenary address with follow-up workshop intensive
- Conference breakout session
- Half-day workshop
- Two-day classes

## Better Together (workshop version)

The chief executive-board chair leadership pair drives a nonprofit’s success—or not. When their working relationship is good, both parties are free to lead their colleagues toward mission impact and enjoy their work. When it is poor, progress stagnates as the chief executive waits for relief and the board chair casts about ineffectively.

Nonprofit chief executives and board chairs can build strong leadership partnerships so:

- They’re both happier and more fulfilled
- The organization achieves more for the mission
- Fundraising, board and staff engagement, and program performance all improve

This session will inspire and equip you to immediately strengthen your partnership. We’ll briefly review the three keys to a strong partnership, and a tool to quickly assess your own partnership. Then, we’ll jump immediately into workshop mode, selecting quick action steps to take no matter where your partnership’s at: OK, good, great, or even poor.

Everyone will walk away with a set of strategic conversation starters that will keep your communication big-picture and interesting rather than tactical and boring. Those participants already in a great partnership will conceive a joint leadership project they can only accomplish together.

The session's based on case studies of seven real-life leadership pairs in the book *Better Together*, which national nonprofit leaders like Emmett Carson, John H. Graham IV, and Elizabeth Darling have endorsed. They show the most successful nonprofit leaders invest intentionally in their partnerships.

Don't leave this most crucial relationship to chance. Changing the world really is *Better Together*.

## **Better Together (general educational version)**

The chief executive-board chair leadership pair drives a nonprofit's success—or not. When their working relationship is good, both parties are free to lead their colleagues toward mission impact and enjoy their work. When it is poor, progress stagnates as the chief executive waits for relief and the board chair casts about ineffectively.

John Fulwider's new book *Better Together* shows how nonprofit chief executives and board chairs can build strong leadership partnerships so:

- They're both happier and more fulfilled
- The organization achieves more for the mission
- Fundraising, board and staff engagement, and program performance all improve

This webinar will inspire and equip you to immediately strengthen your partnership. You'll learn:

- The three keys to a strong partnership
- To quickly assess your own partnership
- Quick action steps to take no matter where your partnership's at: OK, good, great, or even poor
- How to keep conversations strategic and interesting rather than tactical and boring

Changing the world really is *Better Together*.

## **Advance Your Career through Nonprofit Board Service**

You want to invest in your profession, the causes you care about, and yourself, but your time and energy are limited. You need one approach to amplify your effectiveness and impact in all three domains at once. Here's the approach: Strengths-based leadership on a nonprofit board.

With the exercises and information in this workshop, you will:

- Discover that it's perfectly legitimate to use nonprofit and community board service to advance your professional career—if you have a genuine passion for the organization's mission, and you can say with integrity that you're contributing talents and skills the organization's board needs. Nonprofit board service gives you leadership development opportunities that can help you excel in your profession as well.
- Identify nonprofit and community organizations that fit your passions; match your skills and talents to their needs; and plan to perform leadership roles with excellence.
- Learn your own strengths and how you can use them to get better results in your professional pursuits.
- Learn to form strengths-based board leadership teams, so you can have greater impact when you serve on nonprofit boards of directors and with your professional association. This way you'll have the strongest people taking the lead on fulfilling board responsibilities, instead of simply the people who can't say no or (worse) the people who were absent from the meeting when committee chairs were assigned.
- Complete a matrix mapping your and your colleagues' strengths to their responsibilities. You can then use the matrix, and the resources in the book you'll receive, to take your own leadership team, and/or any board of directors on which you serve, from good to great.

Your profession, the causes you care about, and your own personal development matter. Strengths-based leadership ties them all together into a win-win-win with your leadership at the center.

## Making Rock Stars for Mission Impact

What if you were hit by a bus? What would happen to the mission? How about a new opportunity arose for you? What would happen to the mission? How about a scandal where you were removed from leadership? What would happen to the mission?

Our topic here is making mission impact through succession planning. In other, more clever words, we're looking to get the right people on the bus, in the right seats, in case you get hit by a bus—or some other disaster befalls you, because the show, the work, the mission must go on.

You, yes you, nonprofit leader, can use succession planning to develop rock stars on your team and make more mission impact. You can take succession planning from “Ugh, do I have to?” to “Yay, I get to!” when you focus on the mission and not yourself. The mission deserves nothing less.

Through this workshop I aim to help you think seriously and humorously about how you and your team are helping or hampering the mission. I'll do this through the lens of rock star development plans for your team, on the idea that good succession planning means you need to be developing people every day into rock stars who are qualified and credible succession candidates, not just putting people one time on an ordered list of people designated to take over when you're gone.



# 15. About the Author

John M. Fulwider, Ph.D., is an author, teacher and coach who works primarily with non-profit chief executives. He helps nonprofit chief executives use everyday strategic conversations to get their leadership teams and boards rowing in the same direction.

John is a sought-after speaker and the not-yet-bestselling author of five books, including *Better Together: How Top Nonprofit CEOs and Board Chairs Get Happy, Fall in Love, and*

*Change Their World* and *Everyday Strategic Conversations: How Top Nonprofit CEOs Get Their Teams and Boards Rowing in the Same Direction* (forthcoming in 2015).



Photo by Jenny Gegg

John's been a professional communicator since the last millennium. He first wrote hundreds of articles about politics for newspapers. He next taught hundreds of students and wrote thousands of words about political science, and even got a few published. Now, he's on track to ask high-achieving chief executives ten thousand coaching questions that deliver clarity about the next best conversation they can have to change the world.

John works primarily with community-development organizations and community foundations. Some recent clients include alt.Consulting, Communities Unlimited, Minnesota Philanthropy Partners, NeighborWorks Lincoln, NeighborWorks America, and West Central Initiative.

John is a happy husband, a proud papa, a fun-loving foodie, and an advocate of alliteration. He has lived and traveled all over the world. He can suggest what to eat, and where, in an impressive number of cities. While he charges a lot for his other services, his advice on eating out is always free.

## 16. Contact Me



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