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Pleasantries & Pontificating - Transcript

[Speaker 1]

Welcome to Charity Therapy, the podcast where we explore the ups and downs of the nonprofit sector and answer your burning questions. I'm your host, Jess Birken, owner of Birken Law Office, and I'm excited you're here. Imagine hanging out with me and my super smart, funny nonprofit expert pals.

You get to ask them anything about your nitty gritty nonprofit life and get their wisdom for free. Whether you're a seasoned pro or just strapping on your nonprofit boots, we're here to share stories and remind you, you're not alone on this journey. So get ready to join the conversation and bring me the tough questions.

I ain't scared. Ready to rock? Let's dive in.

Welcome to this episode of Charity Therapy. It's Jess Birken here on the mic. And today I have Maria Huntley.

Hey, Maria. Hi, Jess. You haven't been here since 2021, which is like middle of the pandemic or something, I feel like was when we recorded.

I think that was the olden days. Yeah. Right.

We have the before times and the after times. But what is that? That was like the dark times, I guess.

I don't know. But last time you were here, we talked about making decisions in a time of crisis, which was a very timely topic. And you are still with the Minnesota Academy of Family Physicians as their executive director.

And full disclosure to our listeners, Maria is a friend and a client of mine, and I love working with her and MAFP. So whatever biases I have are going to show up, I'm sure. Thanks, Jess.

The feeling's mutual. So on this podcast, like obviously, we've covered like lots of different problems with board meetings, everything from like Robert's rules, people being fanatical, board members treating staff like their personal assistants. But before we dig into today's question, I want to ask you, because I know you and I know you have ideas about this.

What to you does a good, productive board meeting look like, in your opinion?

[Speaker 2]

I would say some of the basics are starting and ending on time. I know that sounds simple, but I think it's really important. And then walking away where everyone's voices is heard, and there's kind of a clear direction of next steps for staff.

Love it.

[Speaker 1]

Okay, so with that, let's get to our listener question, which I'm guessing you can guess is going to be about board meetings. Are you ready to render your wisdoms? Such a great topic.

Let's do this. All right. Hello.

We've been struggling with board meetings taking forever. We have a few people who will review their entire life history every time they get the microphone. I'd like to add time limits to keep things moving.

I want to make it so no one can talk for more than three minutes at one time. But my president is worried that will squash discussion. How do other boards keep things moving?

Sounds like a tricky way to run a board meeting. Right? We don't have the information, but I'm going to assume the person who wrote this question is staff, is like executive director that's trying to manage up.

That's how it feels.

[Speaker 2]

It sounds like it. Well, and I can say like a couple just basic things that come to mind immediately is one thing is, you know, if there's an opportunity for the chair to have some training on facilitation. I mean, I think sometimes we don't always appreciate that's a true skill set that needs to be kind of nurtured.

I think the other thing, the simple thing, seemingly simple thing that comes to mind is like working with the board as a group, some agreed rules or ground rules or expectations. That's kind of sometimes an easy way to bring those things up. Yeah.

And not make it about an individual, but as a group. I don't know. What do you think?

[Speaker 1]

Yeah, I mean, so this, this question is actually a little sassy. Like I, like, what do you mean they'll review their entire life history every time they get the microphone? Like, A, are we using a microphone?

Like, are you being literal? Is there a life history component? Or is this like they're just being a little bit sassy and facetious in the way they're framing this up?

Because I'm wondering if maybe there's not a clear boundary around when is the meeting starting? And when are we having social time? Because in my experience at board meetings, there's a lot of like informal chit chat at the top of the meeting before we kind of get down to business.

So I, I'm curious if that is what the writer is getting at. Like, we're spending too much time socializing when we're supposed to be doing the business. If that's the case, I like your thought of like, hey, let's engage the group on some agreed, like, we're going to allocate this much time to pleasantries.

Like maybe even putting it on the agenda as a 15 minute warm up. I've also had a board when I was on the Charities Review Council, I thought it was fairly clever. And I don't know if they meant it to function this way, but they would do like an icebreaker at every board meeting.

And so it might be something like, let's go around and say, like, you're the thing you're most excited for, for fall, or like, what food are you going to eat at the state fair? And it was kind of a way to say, like, we're going to do something social, we're going to make sure everyone's voice is heard. And then when that's over, we're going right into the agenda.

And I thought it was kind of a nice way to make sure that like everyone shared something and had a pleasant moment of sharing, but also it immediately segued us right into business. What people don't know about you is that you used to work in association management. So you have been sort of like in a bazillion board meetings of all different types and cultures.

[Speaker 2]

Yeah, I would say I think that example you just shared is such a nice example, because it not only gives people an opportunity to talk about themselves a little bit, but it also gives board members a chance to learn about each other in a different kind of way. So I'm a big fan of that. And we do something similar to that in our board meetings.

And I think that when you have kind of a real clear plan and structure, I mean, one of the things I've been a big fan of with my organization related to board meetings is we've transitioned over the years to have shorter board meetings, which, you know, it's interesting in my world, I have colleagues that are like, we meet for two days. And I just can't even imagine that. But you know, to go back to like having structure and expectations, not only to make sure everyone's voices is heard, but you know, I think in today's age, we need to be super mindful about how we're using our board members time and respectful of that.

And that means like kind of creating a culture where no, we're not gonna, you know, create space for people to get up to the microphone or whatever it is, and carry on about whatever it is they want to talk about.

[Speaker 1]

Yeah, yeah. So if we read this question a little bit differently, where it's not chitchat at the beginning of the meeting, but it's literally like going down some rabbit hole of back in my day, and obviously, we don't know with this listener, but I've worked with a lot of organizations that are what I refer to as like legacy nonprofits, where maybe they've been around for 5075 plus years. And you can sometimes at those organizations, you have people who've been on the board or involved deeply with the organization for 2030 years.

And so there can be a sort of essence of like pontificating about the history or the things or the ways in the past and the whatever. And some of that is good, because we want that institutional knowledge. And some of that is we need to do an episode about term limits and turnover, right?

[Speaker 2]

That was something we say a lot in our world is let's look out the windshield, not in the rear view mirror, like the rear view mirror is there for contextual purposes, but we're sitting in a board meeting looking in the windshield, friends.

[Speaker 1]

So let's just say these folks are just talking about stuff that's not even related, that it's kind of literally like, just we're going off on tangents. How would you coach an executive director to sort of manage up? Because it's one thing to be like, great, make your board meetings shorter.

Okay, we can like write it on the agenda that this board meeting is only an hour. But how do you actually get people to stick to that? Like, do you recommend using a consent agenda?

[Speaker 2]

Oh my gosh, yes. I mean, my flip in response to that, Jess, is are there people who don't use a consent agenda? And if not, that's concerning.

And I don't mean that in an insulting way, but that's, I feel like such an important tool. I would say the other thing. So we have what I like to call a recipe that we use for meaningful and generative discussions in our board meetings.

And like, it's actually laid out, like, this is how we're going to discuss this. Because sometimes people need to be told how to have a strategic discussion or a generative discussion. What that looks like for us, I mean, it's a very scripted way of how we talk about things.

But it is a helpful tool to make sure everyone has a chance to share their voice. And it kind of creates a space where it would be extremely awkward for someone to kind of get on their pedestal and start just talking.

[Speaker 1]

Can you give me an example of like, if you're willing to share, it could be real or made up, but like, what's a recipe? And like, how does that work?

[Speaker 2]

Yeah. So, you know, and it's interesting, because in my current role, it's not uncommon for us to have topics at board meetings that are pretty controversial. And so it's really important to create the right space where it can be respectful in the discussions and help build consensus.

For us, if we have a topic, we'll usually start by framing the conversation with either a staff or an expert will come in and provide background on the topic. So, you know, often a staff person or a subject matter expert to kind of frame the discussion. And then we move into the discussion and we require, I put in air quotes, we strongly suggest that when you're speaking, that you start your comments with leading statements, such as I'm curious about, or I wonder about, or it occurs to me.

And by using some of those statements, it kind of discourages people from coming in with problem solving, which is what we always want to do right away. And using those leading statements to kind of frame what people are saying can sometimes help with people getting on their soapbox. And I think, you know, one of the things we try to do is make sure our chair, when we're having those discussions and using those leading statements to make sure the chair is paying attention to who haven't we heard from.

And so if someone gets on their soapbox and then they want to come back and say something again, to give the chair the tools to say, hey, we want to make sure we hear from everyone before we hear from you again. You know, it's a nice way to kind of create some equity on whose voice is heard in the board meeting.

[Speaker 1]

Yeah. You may not want to be the chair if you absolutely can't handle that. Like if you can't facilitate well, even with training, maybe you have the wrong person.

Yeah.

[Speaker 2]

Yeah. I mean, board positions. I mean, that's such a great example of like, not just anyone should be your chair or just because they've served in other roles.

It's okay to define your chair position as we need someone with the skill set, because that's, I don't think that should be dismissed. That's a really important part of like having a functioning governing structure is having someone that can facilitate those conversations. Absolutely.

[Speaker 1]

So I kind of like where this listener is going with, I want to limit everybody to talk for three minutes, but I think that somewhere there's like a hybrid solution that would be a bit less like she's telling us not to speak ever and more like, okay, here's a piece of new business we are going to be talking about. So-and-so is going to deliver background information and everyone has a two-minute comment period and really kind of facilitate that knowing that we need to stay within this time frame of our meeting happening. Sounds like that's a way that this executive director could, it's a win-win, like, yes, we can limit people's time, but maybe not just broadly for everything all the time, but really tee-ing up each discussion and breaking down like what you call the recipe for each discussion item.

Does that feel like a solution that they could use?

[Speaker 2]

It sounds like a great solution. The other thing that just occurred to me is, you know, what we're talking about really here is the culture of your board and the culture of your board meetings. And one of the things that we do that I think could maybe be helpful in this circumstance is I have one-on-one orientation sessions.

There may be 15-minute Zoom calls with board members at the front end of each board year. You can talk about things like, hey, here's what a board meeting looks like and have that as part of your orientation one-on-one, but then also incorporate some sort of cultural expectation into your board training and board orientation you do at the front end of the year. And this goes back to maybe that like shared expectation setting.

But I think it's worthwhile to take a couple minutes during your orientation to say, hey, here's what the culture of our board meetings is like. Everyone's voices is heard. We're being mindful of time.

Nobody's speaking for more than X. And like culture, like if you have to make that cultural shift, that can take a little time. But I think that you can identify a handful of places that you can start plugging that in and setting that expectation on the front end.

You know, maybe you don't have to be so strict and scripted in a board meeting where it's like, we're setting a timer now, and then you're going to stop when the buzzer goes off. Because that can create challenges too.

[Speaker 1]

I love that. I love the idea of starting to create the culture change through how you onboard new people. Of course, only works if you are onboarding new people.

But again, that's a different discussion about term limits and turnover for another day. So I feel like we have a bunch of really good takeaways here. So one is just like, don't assume that your chair or president is a good facilitator.

Like provide training. People are coming to you because they love the mission, not because they love facilitating productive board meetings, right? So if you have somebody in that role, make sure they get the training they need to be a great facilitator.

Second, respect people's time. And there's a bunch of ways we can do that. You know, board members are taking their time serving as volunteers.

Let's respect it. Let's use a consent agenda. If you don't know what that is, that's where you pre-approve a bunch of stuff so you don't have to talk about it and waste time at the meeting.

Keep your board meetings short. Maybe don't schedule a three hour board meeting. Maybe schedule it for an hour and a half or an hour.

Tell your board members a recipe and help them have the discussion in the way that is most productive for whatever the topic is. And then third, I like the idea of doing something that bookmarks the start of the meeting to cut the chit chat. Let's get everybody started.

And then fourth, use board training. Use board orientation to create that expectation and start creating cultural shifts on how your board operates. And you know, if you do have no turnover, you can always still do board training.

You can still try and implement those things. Often, it requires bringing in a third party outsider to talk to your board about how to be a board because they're not going to listen to you. But that can really still work.

So using board training or orientation to get some of these changes going.

[Speaker 2]

Anything you think I missed? No, I think that sounds great. And I will just add if anyone is as nerdy about this stuff as I am, I do actually have like a recipe written out about how to have these kinds of conversations and like what kind of questions you can ask.

And like I have it broken out into like round one and then move into round two and then to wrap it up. So if there are nerdy listeners out there who are like, hmm, tell me more about this recipe.

[Speaker 1]

Are you willing to share that with me? And I can drop a link to it in the show notes. We'll just make it available for download.

Amazing.

[Speaker 2]

Absolutely.

[Speaker 1]

I love that. That's so great. We will absolutely do that.

Maria, you are a treasure as a human and as a leader. I'm so glad you were here today. Thank you so much for sharing your wisdom with us.

If folks want to connect with you online, where should they look for you? LinkedIn is the place to be.

[Speaker 2]

It's sad but true. I know. I'm on the board for an organization, actually.

And we were just talking about our annual directory and I'm like, we have a directory? Well, I mean, because LinkedIn, right?

[Speaker 1]

Yep, exactly. Oh, well, thank you for being here, folks. If you enjoyed this episode, do me a huge favor, subscribe, rate it, leave us a review, like whatever podcast app you're using, give us a high score, okay?

I need Apple to find us and we're so small, but we are growing and you can really make a difference by doing that for the pod. If you have a question or a story or a scenario to share, I would love to hear from you. Head over to charitytherapy.show and drop us a note. Thanks for listening.

About the Author



Hi, I'm Jess Birken.

I'm the owner of Birken Law Office, I help nonprofits solve problems so they can quit worrying and get back to what matters most – The Mission. I'm not like most attorneys, I actually have an outgoing personality, and – like you – I like to think outside the box. Most of my clients are passionate and have an entrepreneurial spirit. I'm like that too. My goal is to help you crush it. Getting bogged down in the minutia sucks the joy out of the important stuff. My clients want to do the work – not the paperwork.

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