

## **Co-Directing - A Leadership “Pas de Deux”**

Competitive or collaborative? Where do you stand on the continuum between these two opposites? How aggressive are you in asserting your organization’s predominance in the community? How willing are you to work collaboratively with other organizations to achieve a common purpose? How competitive or collaborative are you with others within your organization?

Game Theory describes how, in a situation of limited resources, making small self-sacrifices provides the greatest good for the greatest number of individuals. The area that may provide the most challenge to making such concessions is in the actual leadership of an organization. Voluntarily relinquishing authority is not congruent with the competitive instinct of most leaders. However, in the long term, it may be the only way to sustained organizational success.

In Beyond the Bottom Line, a study of outstanding non-profits, Martin Sandler and Deborah Hudson describe their discovery that “where power sharing is most complete, overall performance is most outstanding”. In order to meet the challenges of a demanding environment authority has to be divested throughout the organization. They also found that true power sharing will not be achieved unless it is visibly supported from the top levels of the organization. Co-Directing an organization is the strongest possible demonstration of a commitment to power sharing.

In 1994 Big Sisters and Big Brothers of Calgary and Area was formed through the merger of three existing non-profits: Aunts at Large, Uncles at Large and Big Sisters of Calgary and District. One of the hurdles to overcome in the process was to decide who would take the senior staff role or, to put it in plain language - “who would be in charge”. Two of the organizations had Executive Directors in place and the third organization had just one staff member who did not want a director’s role. The two Executive Directors had a positive working relationship and also had a strong interest in continuing with the new organization. They proposed a classic Canadian solution. If a country can begin with three founding peoples why can’t an organization begin with two founding directors? There was certainly more than enough work to occupy both individuals and they saw no reason to squabble over a job title. The merger committee was initially sceptical but agreed to give the arrangement a trial period of one year. Five years later

the Co-Directorship continues to operate to the benefit of both the organization and the Co-Directors.

Paul Makosz, C.E.O. of P.D.K. Consulting, and a former president of a non-profit, uses a circular model to examine what he describes as the four key elements of an organization: Purpose, Commitment, Resources and Learning. By inquiry into the status of these four elements a picture is created of the health of the organization. It also creates a process for the ongoing evolution of the organization. None of us are what we were, and none of us are what we will become.

Using this model, effective leadership has four purposes: to articulate the purpose of the organization; to create and to sustain the commitment to that purpose; to create and manage the resources that are required to achieve that purpose; and to create opportunities for reflection and learning on what has transpired. This reflection and learning is then used to modify the purpose of the organization. Attending to and linking these four purposes is a complex process that in all probability is beyond the capacity of any one individual.

The current social, political and economic environments create enormous challenges for effective leadership of any organization. Non-profit leaders are doubly challenged to provide effective leadership. In the for-profit world a business provides products or services and receives direct compensation in return. Thus the activities of a for-profit, no matter how diverse, ultimately flow in a single stream. Non-profits deliver their products or services with, by definition, no direct balancing compensation. Compensation is typically received indirectly from a third party such as governments, United Way, corporate or private donor. As government funding dwindles, leaders of non-profits can spend an inordinate amount of time searching for the resources that will permit them to continue delivering their products or services to the community. Thus, most non-profits now have two distinct streams to manage and the non-profit leader is compelled to swing attention from one to the other.

Non-profit leaders are not only expected to have expertise in program delivery and organizational administration; they now need expertise in resource development, including fundraising and volunteer management. It is a credit to the competence of many such leaders that they have acquired a significant degree of skill in both areas.

But there are only so many hours in a day and most non-profit leaders would agree that they feel unrelenting pressure to meet expectations.

The impact of this pressure is seen in reports of “burn-out” and less than optimal functioning. A recent survey in the Calgary Herald found that Canadians are taking fewer and shorter vacations in an effort to keep up with the demands of their positions, and this would certainly include leaders of organizations. In the long run, these pressures are not productive for leaders, their families or their organizations. No organization, non-profit or corporate, can function at optimal levels without a reasonable degree of stability in its leadership positions.

An organization’s strategic planning should include an assessment of the leadership structure of their organization. Does the current model provide the best structure to meet the needs of the organization? Would making the structure more collaborative and less hierarchical be beneficial? Co-Directing is an innovation that a number of organizations, both for-profit and non-profit, have implemented to share the senior staff responsibilities among two or more individuals. In the non-profit world each of the individuals is given equal status on the organizational chart and each reports directly to the Board of Directors. Duties are divided in spheres of expertise and interest but there is inevitable overlap where the input of both Co-Directors is required.

Decisions which have an important impact on both spheres can be decided by a number of methods. David Heenan and Warren Bennis have recently published Co-Leaders: The Power of Great Partnerships. They believe that the strength of the decision making process in such partnerships is the fact that “collective talents far outstrip individual abilities.” If one Co-Director is clearly more knowledgeable about the situation he or she can make the decision with input from the other Co-Director. Most commonly decisions are arrived at by consensus between the two Co-Directors. At the Canadian Outward Bound Wilderness School instructors work in pairs to “co-direct” their course. Instructors consult with each other on all safety decisions and go with the approach that is most conservative. This protocol provides the greatest possible margin of safety and ensures that safety is kept as the paramount concern in all activities. Jon Krakauer’s best-seller, Into Thin Air, which describes a mountaineering catastrophe on Mount Everest provides a chilling scenario of what happens when critical decision making is vested in one individual and well founded protocols are ignored. The analogy

is all too obvious for non-profit organizations that are working in a highly demanding environment.

While decision by consensus is not common practice in Western culture it is standard practice in Aboriginal cultures. The new territory of Nunavut will operate with a council of 19 making decisions by consensus. Their hoped for success may well provide a model for other bodies to follow. Decision by consensus is the preferred and most satisfying method in the Co-Directing model. However, ultimately if the Co-Directors can not agree on a decision the issue can be referred to the Board of Directors. The more rarely this occurs the more successful the Co-Directorship.

Before the Co-Directing model can be implemented, the most common objections to it must be addressed. Co-Directing is a direct challenge to the traditional hierarchical paradigm. One of the primary assumptions of this paradigm, and usually the first objection to be voiced, is that “one person has to be in charge”. This ignores the fact that the Board of Directors, which bears the ultimate responsibility and decision making authority for the organization, is itself a collective decision making group (unless it is one of those dysfunctional entities that we hear about in Board Training Workshops).

An underlying, and amusing, aspect of this objection is the issue of power, or at least the illusion of it. There appears to be a widespread belief that the Executive Director position carries an extraordinary degree of omnipotence. One Co-Director of a family services agency was explicitly asked, “Why would you want to give up the power of being an Executive Director?” It is a telling statement of our colleagues’ perceptions if they think there is genuine power in being the Director of a non-profit agency.

Successful Directors are committed to the success of their organization and not to something as ephemeral as the status of their position. They understand that being a Director is more about accountability than it is about authority. Directors may be more than “Nobodies”, as Pierre Trudeau once described Members of Parliament, but to paraphrase Mark Twain “Reports of our power are greatly exaggerated”. The concept of Co-Directing can be a means of self-discovery for Executive Directors. They can ask themselves, “Would I be willing to share the authority and accountability of my position and if not, why not?” The answer may give them food for thought.

In Co-Leaders: The Power of Great Partnerships David Heenan and Warren Bennis describe some of the ego struggles that Co-leaders can have when they share the position at the “top of the heap” although every instinct and experience may have taught them to crave it solely for him or herself. Unless the individual achieves some personal resolution of the situation or those ego needs are met through other means the partnership may well disintegrate. Good Co-leaders will seek other sources of satisfaction beyond their job which will ultimately makes them more balanced people and healthier leaders.

In the case of Big Sisters and Big Brothers both Co-Directors consciously seek out other activities to challenge themselves further. This can include work related activities such as inter-agency boards or committees, family and personal activities. Para-gliding and picture framing provide them with tangible satisfaction; perhaps even beyond the satisfaction that would come with an Executive Director position. How to Lead and Have a Life is the title of a handbook written by Ian Johnson and Karen Scraba of the Collaborative Leaders Network. The title aptly summarizes an important and positive consequence of Co-Directing.

The “one person in charge” objection to Co-Directing flies in the face of current theories that view organizations as organic. The capacity to make decisions must be found at all levels of the organization. The pace of change and information flow is too fast and too vast for all decisions to move up and down an extended “chain of command”. The senior leadership has a key responsibility to establish the purpose and values within which the organization will operate. They then must allow people to make their own best decisions possible within that framework.

A second objection often made is that the cost of having Co-Directors is prohibitive. In fact, Co-Directing is often less costly than the traditional hierarchical model. Hiring two people who are able to perform tasks at a senior level can eliminate the need for several more junior people who assist the Executive Director. Larry Ginsberg in a recent Globe and Mail column (February 15, 1999) stated decisively, “Truly successful entrepreneurs understand that they can only succeed by hiring the brightest, smartest and most experienced people.”

As a result of the Co-Director model, Big Sisters and Big Brothers of Calgary and Area employs fewer administrative employees in comparison to other similar agencies. This reduces overall salary costs. It also provides a substantial savings in the sky-rocketing costs of benefits packages. In his book The Age of Paradox, Charles Handy describes how it only makes good organizational sense to employ fewer people at a higher salary who operate at a higher level of productivity than to hire more people at a lower salary who, for whatever reasons, operate at a lower level of productivity.

Janus, the God of Gates and Doorways in Roman Mythology, had two faces which allowed him to be looking in two directions at once. Co-Directing gives an organization similar strength. Not only can the senior level of the organization be looking in two directions at once it can be in two places at once. In an increasingly demanding environment this is often a necessity. Why not simply have an Executive Director with a seasoned assistant? In many cases this may work, but it is not always an effective solution.

External contacts want to know that they are meeting with someone who has the authority to make commitments for the organization. Even the most seasoned assistant's decisions are prone to reversal or alteration by an Executive Director. External sources may also feel slighted if they are not meeting with the most senior staff level of the organization. On occasion it is also valuable to have both Co-Directors work as a tag team when meeting externally. An experienced team will almost always be more effective than one person operating alone.

Co-Leading an organization also helps to create the mind-set and skills that are essential for the increasingly important external partnerships with other non-profits and corporations. People who are used to sharing authority and developing a consensus within their organization will be more comfortable working in partnership with people outside their organization.

The collaborative orientation at Big Sisters and Big Brothers of Calgary and Area has helped them in the development of a number of successful partnerships. In fundraising they have partnered with the National Bank of Canada on an annual golf tournament. They also partner with three other charities to stage an annual Home Lottery that brought in more than \$100,000 last year for each partner. In service delivery

partnerships they work with the Calgary Public School Board and the Catholic School District to offer an In-School Mentoring program to children at risk for becoming school drop-outs. They have also partnered with four other non-profits to form a Youth Mentoring Coalition to promote volunteer recruitment and provide volunteer training. Just recently Big Sisters and Big Brothers has begun working with the local chapter of the Youth in Care & Custody Network to provide a mentor to that organization.

To be successful, these partnerships require a strong ethic of shared ownership and stewardship. Such an ethic is inherent in Co-Directing and thus ensures that Big Sisters and Big Brothers will approach partnership opportunities with this key value deeply entrenched.

Internally, there are benefits to co-directing. Problem solving and decision making benefit from the two perspectives that the Co-Directors bring to the situation. Co-directing encourages collaborative decision making throughout the organization, which in turn can create a greater shared sense of commitment to the organization's mission. Big Sisters and Big Brothers involve staff in hiring decisions and the program staff use consensus decision making to match children with adult volunteers. During an organizational analysis by PDK Consulting the staff at Big Sisters and Big Brothers achieved the highest rating PDK had ever recorded for their personal commitment to an organization's mission. This was no small achievement as PDK works with clients on a world wide basis.

Co-Directing is also an inoculation against the dreaded "cult of personality" in which the leader and the organization become dysfunctional because they are so intertwined. The chronicles are replete with tales of organizations that came to grief because the Executive Director and the organization became inseparable. The quote attributed to Louis XIV "L'Etat c'est moi" and the ultimate result for Louis XVI is a good historic illustration of the disastrous consequences that can occur when an organization and its leader are inseparable.

For better or worse, we live in a two gender world and we have not yet evolved to the state where this is a neutral issue. Co-Directing offers the opportunity to have a man and a woman simultaneously lead an agency. For example, Carolyn Goard and Mario Siciliano, Co-Directors of the Y.W.C.A. Sheriff King Family Support Centre in Calgary,

use this dynamic to great advantage for their organization. They have discovered that a male speaking to a male audience on the issue of domestic violence can have a profound impact. Conversely there are situations where it is preferable to have the female Co-Director take the lead for the credibility automatically given to her as a woman. Within their organization the dual gender leadership also provides positive role modelling for the other employees.

Co-Directing provides ongoing stability in leadership both in the short term and the long term. When one director is absent, for out-of-town meetings or a well deserved holiday, the other can make the day to day decisions that are inevitably required. The operation of the organization can continue uninterrupted. This, of course, requires a high degree of trust in each other's decision making capacities. When the absent Co-Director returns, the time required for transition to full productivity is reduced as the other individual has kept up with the flow of decisions and information. In the long term, if one Co-Director leaves the organization there is less of the enormous gap that often occurs when the traditional Executive Director departs. The remaining Co-Director's skills and knowledge will go a long way towards ensuring a continued momentum for the agency and a smooth transition to the new Co-Directorship. In fairness, replacing one Co-Director with another is every bit as challenging as hiring a new Executive Director. Compatibility with the existing Co-Director is crucial. There will also be a tension between trying to recreate the departed Co-Director and bringing in someone with new skills that will help the organization continue its development.

When one Co-Director left the Y.W.C.A. Sheriff King Family Support Centre the succession process was a model of enlightened thinking. While the C.E.O. of the Y.W.C.A was involved in the process as well as the other members of the management team of the centre, it was the remaining Co-Director, Mario Siciliano, who was given the final decision as to who would be hired. For the C.E.O. to relinquish the ultimate authority over the hiring process demonstrated tremendous trust in the remaining Co-Director and insightful understanding of the nature of Co-Directing. Involving the members of the management team who were going to be supervised by the new Co-Director gave them a strong message of respect for their input and a strong investment in the individual who was eventually hired.

A high “goodness of fit” between the existing and the new Co-Director was essential if the Co-Directing model was to continue to be successfully applied. Beyond the specific professional qualifications and the desirable personality characteristics such as a willingness to share authority, a flexible thinker, and a strong teamwork orientation, it was vital that there was a sense of connection at a more personal level, however intangible, between the remaining Co-Director and the successful applicant. This required a good degree of personal awareness on the part of Mr. Siciliano to assess who would be the best match with him to form the partnership. The process was successfully concluded with the hiring of Ms. Goard and both have found a high degree of satisfaction with the resulting Co-Directorship.

Any organization considering this leadership model needs to carefully consider its viability. For Co-Directing to be successfully implemented requires a unique blend of timing and personalities. It is likely and quite reasonable that an established Executive Director would be reluctant to share their position with a newcomer. The best time to introduce the concept occurs when an Executive Director leaves the organization which presents an ideal opportunity to review the organizational structure. Similarly when a new organization is formed either through a merger of pre-existing organizations or it is itself an entirely new organization the opportunity is presented for implementing the Co-Director concept.

No model is a panacea. In order for a Co-Directorship to work, both individuals have to have a shared vision for the organization, a strong capacity to validate and work with their counterpart’s point of view and a common strong work ethic. A personal orientation towards collaboration rather than competition is essential. Any sense of rivalry will be the death knell of the partnership. Each Co-Director must be able to set the organization’s interests before any personal agenda or ego needs. If too much of the individual’s identity is invested in their workplace position it will be very difficult for Co-Directing to work.

Just as with a domestic partnership, constant communication is essential for successful Co-Directing. Sometimes the communication is intense and sometimes it is low key but it must be ongoing. Every team that is successfully Co-Directing reports that they regularly spend time checking in and bouncing ideas off each other. Virtually every morning the Co-Directors at Big Sisters and Big Brothers begin the day with a brief

review of what has happened, what is about to happen and what may happen. At the Sheriff King Family Support Centre both regular formal meetings and informal encounters ensure that the Co-Directors are up to date with each other's activities and in agreement on decisions.

One of the most extensive examples of Co-Directing can be found in the corporate world. A Wall Street Journal article (February 23, 1999) profiles how Monsanto, the chemical and bio-technology giant, has adopted a Co-Directing model in dozens of critical management positions throughout the corporation. A rose by any other name -- within Monsanto it is referred to as "Two in the Box". By pairing individuals with complementary skills they believe better decisions are made and productivity is substantially higher. Each Co-Directing pair at Monsanto has adjacent offices to enhance communication, often a pair will travel on business together and when apart will stay in touch by video conferencing, e-mail and advanced pagers. Some pairs make a point of spending time together informally with each other's family. Many find this especially important at the beginning of the partnership to establish a strong relationship. Like skating champions Bourne and Kratz, successful Co-Directors become attuned to each other and develop an intuitive sense of how to work together for the best performance.

Is Co-Leading the trend of the future for leadership? David Heenan and Warren Bennis believe that Co-Leading is not only the way of the future it is also the way that most successful corporations are already working. Many of the examples they use describe situations where a strong leader is matched with a similarly strong subordinate. They view these situations as *de facto* partnerships; the officially hierarchical relationship exists in name only. Ultimately leadership must emanate from a multitude of sources within the organization for it to experience sustained success. If two well respected writers in the field of organizational management are looking at Co-Leading as a means to meet the challenges of the for-profit marketplace it may well be a model worth considering in the doubly challenging non-profit world.

Co-Directing like co-habitation requires compatibility, cooperation, communication and confidence in your partner. With these elements in place, stronger leadership is achieved and a stronger organization is the end result. Thomas Kuhn in his seminal work The Structure of Scientific Revolutions described how scientific innovations come

into being. Generally they come from the periphery of established thinking. First it is rejected as heresy, then considered and finally accepted as doctrine. Co-Directing an organization provides a challenge to our current way of thinking about leadership however it may well be that in the not too distant future it will be acknowledged as the model of best practice.

*This article is one in a series being written by Jim Campbell and Sherry Ferronato, Co-Directors of a successfully merged organization, Big Sisters and Big Brothers of Calgary and Area, as part of the Muttart Foundation Fellowships. The articles explore current issues in the management of not-for-profit organizations.*