



DRIVING PARTICIPATION

WITH BETH BRODOVSKY

SESSION 141

RECOGNIZING THE DUTY OF FORESIGHT

WITH JEFF DE CAGNA

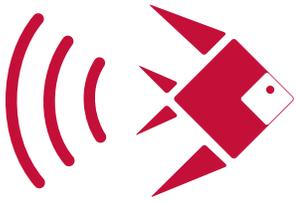
BETH: Hello, this is Beth Brodovsky, and welcome to Driving Participation. Today I am on with Jeff De Cagna. Jeff is the executive advisor for an organization called Foresight First, and Jeff and I have known each other online for many, many years through the association community, and he's doing some really new and interesting things right now. So I thought it would be a perfect time to bring him on to talk about his work moving organizations into the future. We're recording this pretty much at the beginning of 2017, which is often a time when people really want to start talking about the future and what's next. So, Jeff, thank you so much for coming on and joining me today.

JEFF: Thanks Beth. It's my pleasure. I appreciate you having me on.

BETH: So I always love to start off hearing about how people wandered into the work that they do, and it's always interesting to me when it's somebody that I have sort of known for many years to actually hear what your backstory is. So how did you come to doing this work?

JEFF: Well, I got started in the association community. I've been involved for more than 25 years and actually my first job was as the meetings person in an association, which I got based on having been a volunteer meeting planner for a couple of events, one when I was still in college and one right after I graduated from college, and fortunately the person who hired me in the association took my volunteer experience as if it were paid and gave me the job and that's how I started working in associations. So from there, I just sort of parlayed my job from one to the next and then about 15 years ago or so, I made a decision, which was entirely my decision. Part of it was triggered by a restructuring in the association that I was working in that led me to exit that organization, but I made the





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

decision at that time back in late 2001 to go in this direction of consulting and advising associations, and I started that in actually February 2002. So now about 15 years that I've been doing this. So yes, in some ways I fell into it accidentally, but I've stayed in it because I felt called to it and I'm glad that I have.

BETH: I know that a lot of the work that you do with associations is on helping them get focused and helping them to move forward. In this type of work that you've been moving through and what you're evolving to next, how does participation matter? It's the question I always like to ask people about how getting people involved in a very active way makes a real tangible difference to their organization. So how does your version of participation show up?

JEFF: Well, the shift that I have been making now, as I've said, after my 15th anniversary February 1 is a shift from principle innovation, which has been a lot about innovation, which is one form of participation and stuff that I still care about to this idea of Foresight First, which is really focusing a lot on boards. In that situation, there are a couple of things I would say about participation. One is that there is a distinction in my mind between being a volunteer and being a voluntary contributor and in some situations when one serves on a board, directors will see their participation as a volunteer job. It's a job they take on without compensation. In some situations I observed that when people think that way, when they think of themselves as a volunteer doing a volunteer job that it gives them the right to do it in a way that is maybe not always consistently good because they say, "Well I'm not getting paid for this and so I'll do what I can when I can, but I've got to prioritize other things," and when it comes to serving on a board, in particular I feel very strongly that we have to look at that participation as voluntary, rather than volunteer. What that means is you made a voluntary choice. Right. You chose to say yes when someone said, "Hey, we'd love to consider you for the board. Would that be OK?" And you chose to say yes when someone said, "Hey, we've looked at you and we'd love for you to join the board," and you chose to say yes each time you were asked to do something with respect to that board service. So the fact that it is a voluntary choice to





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

participate really means that those who serve in that capacity have to make a commitment to do it well. You can't voluntarily choose to do it and then do it in a way that is essentially a half measure, and/or if you can't do it fully, then you have to make the voluntary decision to no longer do it to allow someone else to serve in their place. So participation is very important. I mean the other way that I think about it is it's really about how are we asking boards today to focus their attention and really devote their attention to the organization because everyone's attention is highly fragmented today. There's lots of distractions out there and so in a time when everyone is talking about user experience, they're talking about customer experience and associations are talking about member experience. More and more I see people talking about or see people writing things about employee experience. There's a lot of discussion around experience today for all of those kinds of audiences and so what I'm interested in in my work now at Foresight First is what I would refer to as DX where we talk about UX for user experience. I'm interested in DX, which is the director experience, and how do we make the experience of serving on boards one where the attention of directors is being devoted to those issues that are most consequential for their organization and that really is about helping prepare associations and nonprofits for a very different future. So there's a couple of different ways that participation is really critical to what I'm doing.

BETH: I really like your definition and sort of how you apply it to volunteers in the general board service and sort of any of the things that we choose to do, and you defined it as like chose to do it without pay, but you know if really aligns with what I've been hearing over the two and a half years that we've been doing this podcast that participation is about choosing to take action, choosing to do something, versus choosing to just be engaged and think about something or show up, but then not take the next steps forward. Like in your world, it's probably people saying, "Yes, I'll be on a board," but then like that's the last step they take. You know, really where's the value in involvement and that you can't really have an impact unless you keep moving forward and keep doing things.



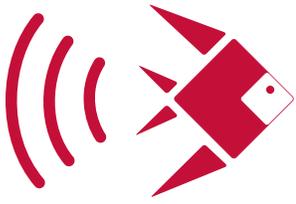


DRIVING PARTICIPATION

WITH BETH BRODOVSKY

JEFF: Well I mean I think the issue for me with boards, a big part of what I care about when it comes to working with organizations is you know, can we be open to hearing lots of voices, can we be very inclusive in our process and that sort of thing. Those are high priorities for me when I'm doing work with an organization is what other voices do we need to include and how can we be open to hearing things that are very different to how we think internally already and it's something I'm sure we'll talk about in this conversation. That having been said, I've also spent a lot of time with boards over the years. I've served on boards. I have done my own sort of training if you will around governing nonprofit organization through board source and harder business and things like that and I've come to conclude that not everyone is well-suited to the work of governing, that the nature of what it means to govern is different from what it means to manage an organization and so governing requires on some level a decision on the part of those who participate to get better at it. Like you have to develop a certain mastery of what it means to play a governing role versus other things where you know maybe it's OK to do it, to be just okay at it. Governing really requires I think a higher level of performance on the part of individuals, on the part of the board themselves, if for no other reason than the stakes are so high for our organizations today. So given that, you know, one's participation in a voluntary situation on a board has to be at the highest level or at least aspiring to get to the highest level. One has to continue to grow and build capacity and develop mastery in this way and I think one of the challenges that boards face in associations and nonprofit organizations in particular is because of this voluntary aspect of things and people making a choice to do it, how do we put on boards? We put smart, successful, capable, talented people on boards and sometimes the challenge there is those smart, successful, talented people don't actually realize that they have more to learn and that they have more capacity still to build and it's not just their own capacity. It's the capacity of the group and they have to be contributors to that. So given that, participation in a governing role, serving on a board I believe is one of the highest callings one can adopt when you're working inside these kinds of organizations, and it requires people to commit to and prove themselves and get better at it because otherwise we're not challenging boards





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

to perform at the highest possible level and then we're getting results that are not really helping the organization. I think unfortunately sometimes governing is viewed as a necessary evil when in fact it really should be a source of advantage for our organizations to be able to move them forward, but that requires performance.

BETH: Yeah, and it's funny. Even though we're governing it sounds tedious doesn't it? It's like, "ugh," governance, and governing, but the way you described it reminds me a lot of when I first started my business. The very first business book anyone ever recommended to me was a book called, "The E-Myth Revisited," by Michael Gerber. Michael talked about entrepreneurship and starting a business in like three categories that you need the technicians or the people that actually deliver the work. You need the entrepreneurs, which are the people that have the ideas and move things forward, and then in the middle is this role of a manager, and that when you start a business a lot of times all three of those jobs is one person, and I remember reading this book having a bachelor's in fine arts myself and zero business education and just having my eyes opened and really seeing that there are different roles and different things that need to happen, but in the world this idea of being an entrepreneur and having the vision, that's all that kind of you know glamorous sounding, but it's really in some ways a similar role. It's setting the strategy, financial oversight, making sure that you're prepared for the future. That's that entrepreneurial role of knowing that you are positioned well to address what's next, which sounds to me like it's some of what governance is about.

JEFF: Well, and you know I even made a choice in my work to really emphasize the term governing as opposed to governance because given what you said earlier, you know I think that the term governance feels to me like it's a thing we have to do, and for me, I really want to encourage the people I'm working with to see governing as an active process to which they contribute and their participation is essential for the success of that. You know there was a time when I would put up a slide at some of my talks and would say, "How can governing





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

unleash passion and energy and innovation in our organizations,” and people would look at it and think, “What is he talking about?” because the way that they associate the idea of governing is with the tedious routines and the kind of problems and exceptions approach to moving organizations forward. Hey, we’ve got an off-budget expense we have to approve. We have a policy exception we have to approve. We have a financial statement we have to review, and I’m not suggesting those are unimportant or unnecessary activities. What I’m suggesting is that there may be better ways and in fact, I believe there are better ways to handle those activities because those are really not what we want I think we want the DX, the director experience defined by. We have consistently defined the role and function and role of boards by what attorneys and auditors and accountants and others tell us it should be and again, I’m not trying to minimize the importance of what they do, but I think what’s different now in 2017 as opposed to the last 10-15 or more years is that we now are operating in a very high stakes environments for associations and nonprofit organizations where our focus on the future, our need for foresight is so crucial and the need for boards to devote their attention to learning what the future, to understand what the implications of what is coming at us, that really needs to be the primary focus. So really this is about reinventing the way we think about governing going forward away from the more tedious approach of what governing is to an approach to governing that is about taking what boards have to do, their responsibility for their organizations, what they are capable of doing, the authority that they have in their decision-making roles and the opportunity that they have because they are coming together on a regular basis to really use that potential and use those resources if you will to help them and to support them in being the most effective learners with the future for their organizations and the decision makers who are able to help guide their organizations through a time that has a lot of challenges today and going forward.

BETH: Right and I think that is a great way. Foresight I think is one of those words where we know the word, but looking at how you’re applying it to this is very interesting because one of the things to start off with is to say, “What is foresight





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

as a concept even mean?” in the work you’re doing?

JEFF: Well, I mean I think if you look up that word in the dictionary you’ll see definitions like it’s about predicting or things like that. For me, foresight, it’s not about predicting or even about forecasting although that is, there are people who do forecasts as part of foresight. There are people who offer predictions, but in this context, for me, it’s the simpler definition, which is the ability or the choice to look forward. It means so much more underneath that. That’s sort of the top level of our definition. For me, what it means underneath there is really three things that I like to think about there. The first is resilience. So the choice to, for a board, to embrace the idea of foresight, to embrace the practice of foresight, the duty of foresight, is to build resilience into their organizations and that resilience comes in a variety of ways and it’s certainly on a practical level. The choice to make foresight the central function of what a board does helps manage risk. Obviously in an environment where there’s a lot of risks, cyber risks and then other kinds of risks. There’s financial risk clearly. There’s reputations risk and so on and so given the fact that we’re given an environment where there are risks that an organization have to appreciate, and I don’t mean perceived risks. I mean actual risk with actual implications. There is that resilience compartment that the ability in an organization, the ability of board focus on understanding what the future could look like helps build resilience that will help the organization deal with the risks. The other risk to it is there’s a need for boards and organizations to build trust with their stakeholders. There are many reports that are coming out showing that stakeholder trust in organizations and institutions like government or NGOs or corporations or the media are at all time lows. Given that, how do boards build trust with stakeholders? One of the ways you can build trust with stakeholders is to devote attention to understanding what the future could look like for those stakeholders and then taking actions today to help them prepare for it. So one aspect of this is building more resilience to organizations. Another aspect of it is responsibility. Boards have a responsibility to build their organizations to thrive and you know as stewards of those organizations, the work of foresight is crucial to their stewardship. In fact, I don’t really believe that you can have





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

stewardship without foresight. I think foresight is fundamental. It's a fundamental act of stewardship and then the final aspect is readiness. Are we building boards and are we therefore building organizations that are capable of learning what is going to happen and what the implications are for the organizations capable of moving beyond old ways of thinking, old ways of acting, old assumptions and adopting new beliefs that help drive the organization forward. So I really think it's a combination of building resilience, exercising responsibility and embracing the readiness to learn so that those organizations are capable of flourishing in an environment that is profoundly challenging for so many.

BETH: I think that's so true, and I really appreciate what you said about trust. I was just speaking for the PCMA conference, the Convening Leaders conference out in Austin and they had an amazing speaker named Rachel Botsman who talked about the sharing economy, and it's so funny because everyone at the conference is talking about I don't know. Sharing, sharing, sharing, but what I actually heard in her presentation is sort of underneath that top layer of do we share our stuff was what allows that to happen and it was about trust and then when I went on to speak about communications, people said, "Well, I don't really see how her presentation has anything to do with what you're talking about." I'm like, "It has everything to do with it because really everything is about trust," If you can't build that foundation of trust, then it's tough for any organization to function. People won't attend your things. People won't participate without trust and it creates that environment for the work that any organization does to happen.

JEFF: That's right, and I'm familiar with Rachel's work, and I think you're spot on, that it is crucial and the thing that I look at with regard to trust is as more organizations, more associations and more nonprofits, really it's more about associations even though many nonprofits have members, that's often a euphemism for donor and so there's still a membership component, but really an association is such a crucial aspect of things. The thing we have to understand is not all stakeholders going forward for associations are going to





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

enter into membership relationships with associations, that there are going to be stakeholders who just do not see the value of the membership relationship. They can't get it paid for. They're looking for something else. They have options. They have alternatives that are available to them and so that's all well and good, and so if an association or any organization is gonna enter into a relationships with a stakeholder that is different from whatever the core relationship has been, I think by definition you're gonna have to figure out ways to build stronger trust with those stakeholders because you don't have the built in trust that may exist with the more traditional offering and so for me, everything that I look at with regard to the board's function in the issue of foresight is I've been influenced by the work of a guy named Rob Cross, who is at the University of Virginia, and what Rob has written about and spoken about is there's kind of two aspects to trust. There's the idea of competence trust and then there's the idea of benevolence trust and what competence trust is is basically a trust on the part of the stakeholder and the part of the individual that you're dealing with that you know what you are doing. You are competent to do your job, competent to perform your role. And then there's benevolence trust, which is you have my best interests at heart. You are there making decisions in a way where you're thinking about me as a stakeholder and for me, the work of foresight is about both of those things. When a board is engaging or pursuing devoting it's attention to the work of foresight, it is saying something to its stakeholders which is one, we are trying to build our competence for understanding what the future could look like for you so that we can then do the next thing, which is understand the implications of that future for you so we can make decisions that will position you to be as successful as possible in that future, even if those decisions mean that we have to encourage you to do something else with your life because obviously there's going to be some fields over the long term where the application of automation is going to have consequences for what type of jobs people are able to have and so we have to start asking the question what's the long term career pathway in this or that field and so the only way to really make this a serious endeavor is to say, "You know what? We're not gonna rule out any of the potential futures that could exist, any of the plausible futures that could exist. We're gonna try to understand





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

all of them. We're gonna try to recognize the human implications of all them and then we're gonna try to make decisions that will help our shareholders be successful." So it's about competence trust and benevolence trust and I think that the importance of that cannot be understated because it is so crucial to rebuilding the overall level of trust that organizations/institutions are able to achieve with their stakeholders today and going forward.

BETH: So you've got a board, you've got stuff, you've got people that are guiding this organization and now you're bringing in this idea of how are we going to know what the future holds so that we can guide the organization and create opportunities and pathways for its members and for its community. Maybe you've got an accountant on your board or a marketing person or a lawyer on your board, but this isn't their background. So how do you begin to give these people a pathway to be able to do this work?

JEFF: Well, I think for me it starts with boards recognizing they have a duty of foresight. So a couple of years ago I wrote an article about Blackberry and I wanted, that particular year I wrote a couple of articles. One that looked at a company that had been highly successful over a short period of time, and that company that I wrote about was Amazon, and then I looked to a company that had been very successful in the short term, then all of a sudden had a major reversal of fortune and I wanted to explore the reasons why, and Blackberry was the company that I focused on. So in looking at the Blackberry example, one of the things that I uncovered through my research was that Blackberry obviously had a very successful launch. The first 15 years were incredibly successful, from the time it was founded in the mid-80s to 1999 when it was a publicly traded company, and even in the years after that when it was one of the most dominant companies in the world and had dominant market share in the US in terms of phone usage, up to 43 percent at its apex, and now all of a sudden, you know, it's an afterthought and took very much less time for the company to go from its peak to its nadir, they go from its beginning to its period in 1999 when it was right at the top there and why did that happen? Part of the reason why that





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

happened, in my view based on research is the board and management of that company failed to exercise what I refer to as duty of foresight is what I coined for that article, which was taking responsibility to look further down the road and say, “How can this play out?” and there was certainly plenty of reasons for them to engage in the work of foresight on behalf of the company and not the least of which was the introduction of the iPhone in 2007 by Steve Jobs, something that we just celebrated the tenth anniversary of that not too long ago, and you know, they really failed at that responsibility in a profound way, and so that duty of foresight was something that I thought was so important not just to companies, but particularly to associations and nonprofits, because if that kind of spectacular decline could occur to a company like Blackberry that had been so successful given the resources and reputation and assets that Blackberry had to bring to the table, imagine how much more challenging it is for organizations that have far fewer resources, far fewer assets and just ...

BETH: And board members were not getting paid ...

JEFF: Right. Board members were not being compensated. Just less of everything in that regard. They have more of some things, but they have less of many of the assets and resources that they would want to have to be able to build themselves in the future. It’s become so crucial for those organizations to be serious in understanding what the future could look like given the depth and intensity and speed of the transformation of our society that has been under way for the last many years now and shows no signs of abating any time soon. It’s only gonna get faster, deeper and intense. So why not take the opportunity to devote organizational attention to understanding what the future could look like and embrace it as much of a duty as any of the other duties that nonprofit boards have, duties of care, loyalty and obedience, which are all recognized in law and are part of fiduciary responsibility. They are essential to the success of the organizations, but or and, the duty of foresight really is in many ways the crucial aspect of how are we going to participate and prepare for what





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

transformation will bring to our stakeholders, to our organizations, to our field. The more the organizations, the more associations and nonprofits are willing to do that, I believe the better off they're going to be over time because they will be ahead of the game. They will have learned with the future and they will have an opportunity to make decisions earlier in the process rather than waiting until much later and the organizations that wait later I think will be in a much better position.

BETH: So if somebody listening said, "Gee, we could really use this in our organization," how does somebody begin making this transition in their organization, to begin to focus on foresight?

JEFF: Well, I think in many ways the consistent practice of foresight is crucial so it's not a one-off thing. It's not something you do occasionally. It's something you're doing all the time. It has to become sort of a central focus of how the board is devoting its attention, but the really specific thing that is a starting point, this is about learning so foresight is about learning with the future. It's the intentional process of learning with the future, but it also begins with unlearning. It begins with challenging existing assumptions or what I refer to as orthodox beliefs. Every organization operates on some sort of orthodox beliefs that has to be challenged and has to be questioned. They have to be examined closely. They have to be tested for whether or not they're still true or whether or not they are still helpful and if they're not true nor helpful, then we have to ask why do we still hold those beliefs. Why are we still thinking in this way if in fact the beliefs we hold are not true and are not helpful to us? So the unlearning process that clears out ways of thinking from the past, so it clears out the noise of the past if you will, so that the association or nonprofit can really hear more clearly the signal of the future I think is a crucial first step for every organization. Obviously there's a lot that goes into that, but I think the very first thing that boards and their staff partners can do is start asking the question, "What are our orthodox beliefs? What are the beliefs that we hold particularly with a lot of intensity? They are very deeply felt and which belief are very influential in





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

the way we conduct business.” So we’re looking at what are those high intensity high influence beliefs that may be preventing the organization from thriving because we’re so committed to them even though they’re no longer helpful to us or they may be less helpful than we believe. Just to go back to the membership piece, membership is an orthodox belief that exists in many organizations and nonprofits that we have to have a membership relationship with every stakeholder and I think it’s an orthodox belief that we have to examine. That’s just one of many, many orthodox beliefs that exist. So that’s a very particular thing that creates the framework. It establishes a foundation for being able to do things that say now we can sort of understand what our past beliefs are that were getting in the way. We can open up our minds to really understanding what the future could look like and learning with it at a much more proactive way and not getting stuck on those assumptions that really aren’t helpful to us.

BETH: That really makes a lot of sense and I really like how you position that as examining those beliefs because a lot of times people get anxious or nervous about change and about doing things differently, and that this process isn’t necessarily about changing. It’s about evaluation and about making sure that you aren’t just doing what you’re doing because that’s the way you’ve always done it and thinking about whether or not continuing to do it that way serves the organization and serves the actual members themselves.

JEFF: Well, I think in the end in the long run it is about shifting the organization’s ways of thinking, but you’re right in the sense that examining our beliefs, we have to examine all of our beliefs and it’s true that some beliefs are still going to serve us well. Like we will examine our belief and say is this still true? Yes, it’s still true. Is this still helpful to us? Yes, it’s still helpful. OK, so let’s continue to hold that belief. The process of examining orthodoxy however is going to yield a lot of looking at beliefs that are out voted. Right. Hopefully things that are not really helpful and we need to find ways to fill the void created when one belief is challenged and ultimately discarded. We have to find a way to fill that belief, fill that void with a belief that says if we’re not going to hold this belief, right





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

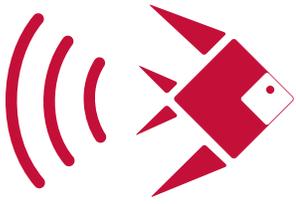
we're gonna say for example, discard the notion that every relationship with stakeholders has to be defined by membership, then what fills that void? The void can be filled with a belief, for example, something like we can negotiate other relationships with our stakeholders to involve them or have them participating and contributing to the work of the organization, even if that is not defined by membership. Now we have to go out and test that, and we have to find ways to experiment with ways to make that happen, but we have to be able to fill the void created when old beliefs are discarded with new ways of thinking that really do push us, really push the organization to the future and the work of boards on orthodoxy is crucial because in many ways, people who work in and around associations and nonprofits, whether they're on staff or consultants, frequently one of the orthodox beliefs that exist in our thinking is that the board is the locus of all the orthodoxy that prevents the organization from thriving.

BETH: Oh, absolutely! Yes, definitely.

JEFF: And so if we see the board as the holders of the past belief system, then the holders of the past belief system have to be the ones to say, "You know what? We've got to examine the past belief system." If the board is unwilling to unlearn its assumptions, the assumptions that it brings to the table, then it can hardly ask others within the organization to be the ones to do it either. So we have to really challenge boards to do the unlearning piece and then help them do the learning piece so that the conversation can not be held back and can actually move forward in a more progressive way.

BETH: That definitely makes a lot of sense, and it's interesting in talking to people through this program, one of the main things that I've heard over the years has been the term "leadership buy-in" and I always feel like buy-in isn't really the right word. It's that you need people to lead from the front. You need people to not just say, "I agree to this," but that I'm going to grab your hand and drag you over to this. So your conversation, your perspective on putting people into the place where they have the capacity and the support that they need to really think





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

about this is so helpful. It's a great thing for all of us to be thinking about now and really any time of the year to think about how we can be moving forward and supporting organizations to be the best versions of themselves. I want to thank you so much for joining me today. This was such an interesting conversation. I'm sure there's lots more we could talk about, but I think we're gonna leave it here for today. If people do have more that they'd like to talk about, what's the best place to reach out to you?

JEFF: Well, people can get in touch with me through my website, ForesightFirst.io and also they can reach me on chat. I have a chat link, which is Chat.Center/ForesightFirst, and those are good options for being able to reach me and learn more about what I'm doing.

BETH: I will put links to both of those things into our show notes page. Jeff, thank you so much for joining me today and sharing all of your insight and knowledge with both me and our whole nonprofit community.

JEFF: It's my pleasure, Beth. I thank you again for having me on the show.

Share the Love

Download Our Love-Themed Templates Now

