



# Podcast Transcript

## Dynamic Duos

### Episode 1: A Culture of Respect

#### [Lori Schwartz]

The board is what can make or break a CAP agency. You need to be open and honest and work with your chair and your board if you're going to be successful.

#### [Narrator]

This is CAPLAWCast, a podcast hosted by Community Action Program Legal Services. That was Lori Schwartz, executive director of Lakes and Prairies Community Action, otherwise known as CAPLP, in Moorhead, Minnesota. We spoke with Lori and Paul Krabbenhoft, CAPLP's board chair and public sector director, about how they work together as a "dynamic duo" to lead their Community Action Agency.

Lori and Paul have built a partnership based on mutual respect, trust, and years of being a part of the same community. Their paths briefly crossed through inter-family ties long before Lori, and later Paul, joined CAPLP.

#### [Paul Krabbenhoft]

I think it's both our demeanors and our attitudes about things with openness and respect, but our trust has been there since day one. Lori and I have actually known each other about 40 years. However, I think there were about 30 – almost 30-some years gap in that period of time. We had a little background, which I think was helpful. So it wasn't like having to meet a brand new person and start a new relationship.

#### [Narrator]

Lori emphasizes how essential it is that she can rely on Paul as her board chair.

#### [Lori]

Working with Paul as the board chair, there are a lot of conversations that he and I have to have that I may not have with the full board. For the protection of the agency, I feel the more transparent and the more I can have open communication with the board chair – and of course the board too, but my go-to is the board chair – and just really feeling confident that I can trust him in helping me make good decisions in what the plan should be.

#### [Narrator]

Maintaining open lines of communication further establishes the symbiotic nature of the executive director and board chair relationship.

#### [Lori]

It's really important to me that I can call Paul or text Paul and say, "Hey, I need to visit with you about something." And it is probably something that is never going to even reach the board level. Or it's not a decision the board has to make, but it is something that I am maybe facing – I'm struggling with a situation from an external partner, whatever it might be – I feel so strongly that I need to be able to share that with Paul. I think that he should know about it. If Paul is out in the community and somebody brings something up, I think it is so much better if the board chair, if Paul could say, "Yes, I'm aware of that and I understand that you're working on it."

I tend to share most everything and be as transparent as possible. If we have an issue in the organization that I either had no control over it happening, or maybe I did, the first person I go to is Paul, to share with him what has happened and to own it, whether, you know, if it was my error on my part, because I need the chair and the board. I can't do this job without them. So Paul and I communicate, I would say, no less than three to four times a month. And it might be just through a text, or often it's a cup of coffee just to say, "Hey, here's what's going on."

**[Narrator]**

Although they work together to solve problems facing their CAA, Paul never loses sight of the role he plays as board chair.

**[Paul]**

I'm not a micromanager. I know my place. I'm a policy maker. I lead with that attitude, and I let the people within agencies do their work. That's how I respect them. Whether it's Lori or anybody else on staff, they're the experts, not me. I want information from them, and my purpose, I truly feel, is to help with the guidance and, again, direction of whatever the current policy is, or do we need to find new directions?

**[Narrator]**

Lori and Paul underscored the role regular meetings play in ensuring they are on the same page when it comes time for board meetings.

**[Lori]**

We have 11 board meetings a year, and that is because we combine our November and our December board meeting for joint training with the Head Start Policy Council. Paul and I meet – well, probably more than monthly, but specifically monthly – we meet in person to go over the next month's board meeting. A lot of the business items that we are going to be discussing with the board have come from the directors of the programs within the agency and or it could be an item that comes from human resources, that we're going to begin work on our personnel policy manual.

Oftentimes those things are structured, and they are things that are regular items on the agenda. And for things that are out of the ordinary that I am considering bringing to the board, but I'm not 100% sure if that's the direction I should go, during that monthly meeting with Paul, you know, I go through the regular agenda items that we have monthly, the typical items that the directors would bring, and then anything that would seem a little bit out of the ordinary.

I would have a discussion with Paul and ask if this is something that he's comfortable if we put on the agenda for further discussion with the board, whether it's only to inform and not for approval, but just to inform, to get the conversation started with the board. And we go through, you know, line item – our agendas are pretty structured, they follow a format. We go through each and every line item because we have things that are really important to us.

Before we start each board meeting, we recite the Promise. We either discuss one of our core values or one of the code of ethics. You know, Paul has really embraced the work that we do and getting involved in this, but he hasn't been in it for 32 years. So it's a good – you know, we like to have the conversation about it so it means something to Paul, too, when he's when he's leading the board.

**[Paul]**

This prep meeting that Lori and I have before every meeting, like for instance – and we have a set schedule every month, and it may vary if there's a conflict, but the meeting is on Thursday this week, and normally we're together anywhere from two to two and a half hours. So it's in-depth. Part of it is me learning what it is actually that we're putting on the agenda. So I feel I have enough background, especially an action item, to be fluent enough that I can – I'll bring up the agenda item, and then I'll go to Lori for background, but be familiar enough whatever the background is, so that when I'm with the board, it's not just being presented. And this hopefully creates conversation, you know, so it isn't simply a rubber stamp of what the office wants. So I do my best at that, keep it fluid and conversational.

[Narrator]

At board meetings, Lori and Paul reiterate how they stick to their responsibilities to ensure things run smoothly and properly.

[Lori]

Paul really takes the lead on facilitating the board. It's really important to us both, and our board, that nothing appears to be pushed through or rubber stamped, that we take that very serious. And so the better understanding that Paul and I have in terms of what we're exactly asking, the better, you know, we are together able to explain it to the board. But Paul definitely takes the lead in initiating the agenda items and running the board meetings. And then, of course, when it's my turn as the executive director to do my report out, you know, Paul gives me the opportunity to do that.

[Paul]

One of the things that I feel is my job is to keep the, the board in order, if you will, so we don't get sidetracked. I very much hold to a two-hour meeting as best we can, I don't like going on. It's my pet peeve. We linger, I'm going to move it forward, and we just have to keep – that's a respect thing. I mean, we have 13, or excuse me, 15 people roughly showing up somewhere. You know, they have their families, you know other things. We do our meeting from 6:00 to 8:00pm at night. So it's not easy for people with, you know, other family members that they need to be caring for that evening, too. So just try to keep things tight, keep it in a certain motion.

[Narrator]

A shared system of beliefs guide Lori and Paul's relationship, as well as how the board of CAPLP manages its affairs.

[Lori]

We have a set of core values that we have a CAPLP. And we review those core values, or we start brand new staff who are even applying for a job at CAPLP with these core values. If and when they're hired, we review them. We also do the same thing with the board. It's part of the board orientation. And I often share this with board members at board meetings, that whenever we're going through difficult times like we do – the work is hard, the work is challenging. We run into barriers sometimes that are super uncomfortable, and it may even be a disagreement that we have with each other, as long as we're abiding by the core values that we agreed to from the start of our relationship, I feel like there's just nothing that we can't work out and get through in, in a successful way.

[Narrator]

Both Paul and Lori particularly noted how providing training and background materials to the board contributes to their common goal of engaged and active directors.

[Paul]

What I've noticed that Lori does very well – not only is it the training that probably would be utilized, you know, under a CAPLP ideology – I think there is also the fact that our board packets, they're thick. And what I mean by that is there's a lot of information there. So if you are a board member – and not everybody's wired this way, right – but if you're a board member that wants to learn as you're doing board duties, it's all there for you. All you've got to do, you know, you can be as engaged as you want. So to me, it's about are these board members reading their packets? We emphasize that every meeting. They're coming. You're getting them ahead of time, please. You know, just come to the meeting best prepared you can. And if they do that, you know, that sets you up to be successful, because you just have so much more depth. And in many cases, if it's represented, you know, in the same light at the meeting, well, you've got a sense of what you're being told or taught.

[Lori]

Trainings that we put on as an agency for our staff, board members are invited to our all-staffs. They're encouraged to attend. We just held another poverty simulation that we facilitate here at CAPLP, and we invited our board members, and we had a few that attended. And then we do our best to have at least annual board retreats where we spend a

day together, or maybe a day and a half. I will say that that has gotten more and more difficult with people's work schedules. It really has, but we still do our best to find a date, and we have done everything from StrengthsFinder training together with the board and our leadership team, to the Real Colors training, the Intercultural Developmental Inventory – we do those trainings to, again, help us work better together. You know, get to know each other's strengths and our areas that, you know, we could have a little opportunity to improve on, you know, where we're coming from. So we value training, and again, whenever possible, we take the opportunity to provide training.

And then, of course, we consider information that we send to our board members in the packets to be, you know, training information. Our finance director does an annual fiduciary training, duty of care, loyalty, and obedience. So we really believe in professional development and, you know, training at CAPLP for our staff and our board. So whenever possible, we like to provide, you know, best practice training.

**[Narrator]**

Together, Lori and Paul have built a strong, collaborative relationship where they can co-steward CAPLP towards additional success. Here's Lori with some final advice on how to start working towards what she and Paul have.

**[Lori]**

The advice that I would give, and it may sound like an easy like, "Well, of course, we do this," but I think that one of the most important things that an executive director and a board chair can do together before they start working on all of these major, major, important issues, is to get to know each other a little bit, and to get to know each other's background. You know, people – don't mean to sound cliché – but it truly is about relationships. And if we don't take the time, and I think, as executive directors, I think that is on us to take the time and make it work out with your board chair, so that that person really understands what their role is, why things are the way they are, why things may look different within the Community Action world.

**[Paul]**

Almost everything she said, it's vice versa. You know, really.

**[Narrator]**

The relationship between a CAA's executive director and board chair provides the framework for how the organization will function overall. Ensuring that both individuals understand their role, communicate openly and are invested in the development and engagement of the board are great steps towards strengthening your CAA's capacity and abilities.

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