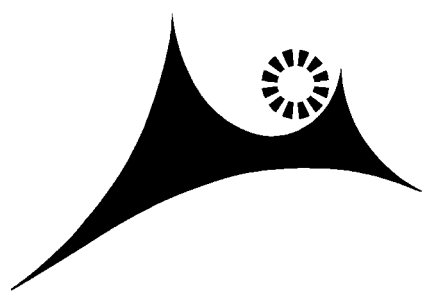


Board Leadership Begins With You

Tips & Techniques for
Managing Trustee /
Director Relationships



NYLA 2005 presentation by
the Mid-Hudson Library System. Presenters:
Josh Cohen, Rebekkah Smith Aldrich, Merribeth
Advocate

Your Preferences

WHERE PRIMARILY IS YOUR ENERGY DIRECTED?			
	√		√
Tolerate noise and crowds.		Avoid crowds and seek quiet.	
Talk more than listen.		Listen more than talk.	
Communicate with enthusiasm.		Keep enthusiasm to self.	
Be distracted easily.		Concentrate well.	
Meet people readily and participate in many activities.		Proceed cautiously in meeting people & participate in selected activities.	
Blurt things out w/o thinking.		Think carefully before speaking.	
Hates to do nothing. On the go.		Time alone to recharges batteries.	
Likes working or talking in groups		Would prefer to socialize in small groups or just do job "by myself."	
Likes to be center of attention.		Content being on the sidelines.	
More checks in this column = E		More checks in this column = I	

HOW DO YOU BEST GATHER & PROCESS INFORMATION?			
	√		√
Learn new things by imitation and observation.		Learns new things through general concepts.	
Value solid, recognizable methods achieved in step-by-step manner.		Value different or unusual methods achieved via inspiration.	
Focus on actual experience		Focus on possibilities.	
Tend to be specific and literal; give detailed descriptions.		Tend to be general and figurative; use metaphors and analogies.	
Behave practically.		Behave imaginatively.	
Rely on past experiences.		Rely on hunches.	
Likes predictable relationships.		Values change in relationships.	
Appreciates standard ways to solve problems.		Use new and different ways to solve problems and teach solutions.	
Methodical.		Leap around in a roundabout way.	
Value realism and common sense.		Value imagination and innovation	
More checks in this column = S		More checks in this column = N	

HOW DO YOU PREFER TO MAKE DECISIONS & REACH CONCLUSIONS?			
	√		√
Have truth as an objective.		Have harmony as a goal.	
Decide more with my head.		Decide more with my heart.	
Question others' findings, because they might be wrong.		Agree more with others' findings, because people are worth listening to.	
Notice ineffective reasoning.		Notice when people need support.	
Choose truthfulness over tactfulness.		Choose tactfulness over truthfulness.	
Deal with people firmly, as needed		Deal with people compassionately.	
Expect world to run on logical principles.		Expect the world to recognize individual differences.	
Notice pros & cons of each option.		Note how an option has value and it affects people.	
See others' flaws... critical.		Like to please others; show appreciation.	
Feelings valid if they're logical.		ANY feeling is valid.	
Tolerate occasional queries as to my emotional state in relationships.		Appreciate frequent queries as to my emotional state	
More checks in this column = T		More checks in this column = F	

HOW DO YOU PREFER TO ORGANIZE YOUR LIFE?			
	√		√
Prefer my life to be decisive, imposing my will on it		Seek to adapt my life and experience to what comes along.	
Prefer knowing what they're getting themselves into		Like adapting to new situations.	
Feel better after making decisions		Prefer to keep things open.	
Enjoy finishing things.		Enjoy starting things.	
Work for a settled life, with my plans in order.		Keep my life as flexible as possible so that nothing's missed.	
Dislike surprises & want advance warnings.		Enjoy surprises and like adapting to last-minute changes.	
See time as a finite resource, and take deadlines seriously.		See time as a renewable resource, and see deadlines as elastic.	
Like checking off "to do" list.		Ignore "to do" list, even if made one.	
More checks in this column = J		More checks in this column = P	

Your Type is:
 (E or I) (S or N) (T or F) (J or P)

Their Preferences

WHERE PRIMARILY IS THE PERSONS ENERGY DIRECTED?			
	√		√
Tolerate noise and crowds.		Avoid crowds and seek quiet.	
Talk more than listen.		Listen more than talk.	
Communicate with enthusiasm.		Keep enthusiasm to self.	
Be distracted easily.		Concentrate well.	
Meet people readily and participate in many activities.		Proceed cautiously in meeting people & participate in selected activities.	
Blurt things out w/o thinking.		Think carefully before speaking.	
Hates to do nothing. On the go.		Time alone to recharges batteries.	
Likes working or talking in groups		Would prefer to socialize in small groups or just do job "by themself."	
Likes to be center of attention.		Content being on the sidelines.	
More checks in this column = E		More checks in this column = I	

HOW DOES THE PERSON BEST GATHER & PROCESS INFORMATION?			
	√		√
Learn new things by imitation and observation.		Learns new things through general concepts.	
Value solid, recognizable methods achieved in step-by-step manner.		Value different or unusual methods achieved via inspiration.	
Focus on actual experience		Focus on possibilities.	
Tend to be specific and literal; give detailed descriptions.		Tend to be general and figurative; use metaphors and analogies.	
Behave practically.		Behave imaginatively.	
Rely on past experiences.		Rely on hunches.	
Likes predictable relationships.		Values change in relationships.	
Appreciates standard ways to solve problems.		Use new and different ways to solve problems and teach solutions.	
Methodical.		Leap around in a roundabout way.	
Value realism and common sense.		Value imagination and innovation	
More checks in this column = S		More checks in this column = N	

HOW DOES THE PERSON PREFER TO MAKE DECISIONS & REACHING CONCLUSIONS?			
	√		√
Have truth as an objective.		Have harmony as a goal.	
Decide more with their head.		Decide more with their heart.	
Question others' findings, because they might be wrong.		Agree more with others' findings, because people are worth listening to.	
Notice ineffective reasoning.		Notice when people need support.	
Choose truthfulness over tactfulness.		Choose tactfulness over truthfulness.	
Deal with people firmly, as needed		Deal with people compassionately.	
Expect world to run on logical principles.		Expect the world to recognize individual differences.	
Notice pros & cons of each option.		Note how an option has value and it affects people.	
See others' flaws... critical.		Like to please others; show appreciation.	
Feelings valid if they're logical.		ANY feeling is valid.	
Tolerate occasional queries as to their emotional state in relationships.		Appreciate frequent queries as to their emotional state	
More checks in this column = T		More checks in this column = F	

HOW DOES THE PERSON PREFER TO ORGANIZE THEIR LIFE?			
	√		√
Prefer their life to be decisive, imposing their will on it		Seek to adapt their life and experience to what comes along.	
Prefer knowing what they're getting themselves into		Like adapting to new situations.	
Feel better after making decisions		Prefer to keep things open.	
Enjoy finishing things.		Enjoy starting things.	
Work for a settled life, with their plans in order.		Keep their life as flexible as possible so that nothing's missed.	
Dislike surprises & want advance warnings.		Enjoy surprises and like adapting to last-minute changes.	
See time as a finite resource, and take deadlines seriously.		See time as a renewable resource, and see deadlines as elastic.	
Like checking off "to do" list.		Ignore "to do" list, even if made one.	
More checks in this column = J		More checks in this column = P	

Their Type is:
 (E or I) (S or N) (T or F) (J or P)

How to Approach Different Temperament Types

Types	Characteristics	How to Approach
<p>TRADITIONALISTS</p> <ul style="list-style-type: none"> • Prefer sensing and judging • Includes: ESTJ, ISTJ, ESFJ, ISFJ • 40% of the population 	<ul style="list-style-type: none"> • Trust facts, not interested in theories • Decisive • Follow through • Resist new approaches • Good managers 	<p>Make a case based on hard facts</p> <ul style="list-style-type: none"> • Use survey results • Know impacts on staffing, space, finances • Provide facts in writing • Provide concrete examples
<p>EXPERIENCERS</p> <ul style="list-style-type: none"> • Prefer sensing and perceiving • Includes: ESTP, ISTP, ESFP, ISFP • 30% of the population 	<ul style="list-style-type: none"> • Focus on immediate tasks • Take things literally • Work independently & need to be active • Strong sensory memory 	<p>Engage them</p> <ul style="list-style-type: none"> • Focus on the library's mission & vision • Tell how it changes a life • Share success stories
<p>IDEALISTS</p> <ul style="list-style-type: none"> • Prefer intuition and feeling • Includes: INFP, ENFP, INFJ, ENFJ • 15% of the population 	<ul style="list-style-type: none"> • Focus on the needs of others • Creative, enthusiastic, insightful • Interpretive • Require meaningful work 	<p>Sell a dream & possibilities</p> <ul style="list-style-type: none"> • Focus on critical issues library can solve by taking this action • "It's the right thing to do for the community"
<p>CONCEPTUALIZERS</p> <ul style="list-style-type: none"> • Prefer intuition and thinking) • Includes: INTP, ENTP, INTJ, ENTJ • 15% of the population 	<ul style="list-style-type: none"> • Independent, logical, skeptical • Design solutions • Challenge rules or customs • Value powerful people and positions 	<p>Big picture</p> <ul style="list-style-type: none"> • Describe the big picture & the opportunity • Focus on innovation & excellence • Talk about the strategic position of the library • Show how doing this builds the library's capacity

Group Roles

Every member of a group plays a certain role within that group. Some roles relate to the task aspect of the group, while others promote social interaction. A third set of roles are self-serving and can be destructive for the group.

<p>Task Roles help the group accomplish its objectives</p>	<ul style="list-style-type: none"> • Initiator-contributor: Generates new ideas. • Information-seeker: Asks for information about the task. • Opinion-seeker: Asks for the input from the group about its values. • Information-giver: Offers facts or generalization to the group. • Opinion-giver: States his or her beliefs about a group issue. • Elaborator: Explains ideas within the group, offers examples to clarify ideas. • Coordinator: Shows the relationships between ideas. • Orienter: Shifts the direction of the group's discussion. • Evaluator-critic: Measures group's actions against some objective standard. • Energizer: Stimulates the group to a higher level of activity. • Procedural-technician: Performs logistical functions for the group. • Recorder: Keeps a record of group actions.
<p>Social Interaction Roles maintain & improve relations specifically when compromise is necessary for progress</p>	<ul style="list-style-type: none"> • Encourager: Praises the ideas of others. • Harmonizer: Mediates differences between group members. • Compromiser: Moves group to another position that is favored by all group members. • Gatekeeper/expediter: Keeps communication channels open. • Standard Setter: Suggests standards or criteria for the group to achieve. • Group observer: Keeps records of group activities and uses this information to offer feedback to the group. • Follower: Goes along with the group and accepts the group's ideas.
<p>Self-Serving Roles satisfy a personal need more important to the individual than group success</p>	<ul style="list-style-type: none"> • Aggressor: Attacks other group members, deflates the status of others, and other aggressive behavior. • Blocker: Resists movement by the group. • Recognition seeker: Calls attention to himself or herself. • Self-confessor: Seeks to disclose nongroup related feelings or opinions. • Dominator: Asserts control over the group by manipulating the other group members. • Help seeker: Tries to gain the sympathy of the group. • Special interest pleader: Uses stereotypes to assert his or her own prejudices.

Phases Groups Go Through

These phases are all necessary and inevitable - in order for the group to grow, to face up to challenges, to tackle problems, to find solutions, to plan work, and to deliver results.

Forming

The first phase – the group meets, agrees on goals and on the resources necessary to tackle the task. Group members tend to still behave quite independently. They may be motivated, but are relatively uninformed of the issues and objectives of the group. Processes are often ignored. Leader directs.

Norming

Agreement and consensus is largely formed among group, who respond well to facilitation by leader. Roles and responsibilities are clear and accepted. Big decisions are made by group agreement. Smaller decisions may be delegated to individuals or committees. Commitment and unity is strong. The group may engage in fun and social activities. The group discusses and develops its processes and working style. There is general respect for the leader and some of leadership is more shared by the group. Leader facilitates and enables.

Storming

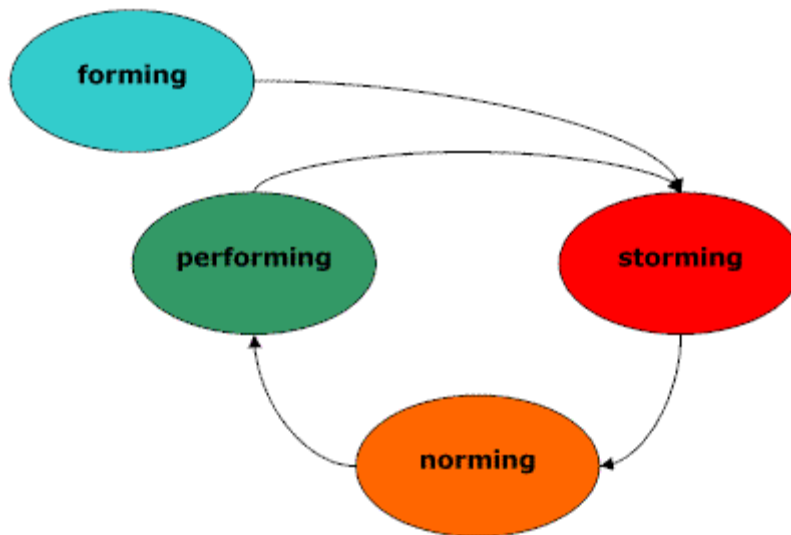
Every group will then enter the *storming* stage in which different ideas compete for consideration. During this phase, the group addresses issues such as what problems they are supposed to solve, how they will function and what leadership model they will accept. Group members open out to each other and confront each other's perspectives. They are still relatively unacquainted with a shared vision. In some cases, the *storming* stage can be resolved quickly. In others, the group never leaves this stage.

The *storming* stage is necessary to the growth of the group. It can seem contentious, unpleasant and even painful to members of the group who are very averse to conflict. If improperly managed, this phase can become destructive to the group and will lower motivation. Leader coaches.

Performing

The group is more strategically aware; the group knows clearly why it is doing what it is doing. The group has a shared vision and is able to stand on its own feet with no interference or participation from the leader. There is a focus on over-achieving goals, and the group makes most of the decisions against criteria agreed with the leader. The group has a high degree of autonomy. Disagreements occur but now they are resolved within the group positively and necessary changes to processes and structure are made by the group. The group is able to work towards achieving the goal, and also to attend to relationship, style and process issues along the way. Group members look after each other and have become interdependent. The group requires delegated tasks and projects from the leader. The group does not need to be instructed or assisted. Leader delegates and oversees.

Even the most high-performing groups will revert to earlier stages in certain circumstances. Many long-standing groups will go through these cycles many times as they react to changing circumstances. For example, a change in leadership may cause the group to revert to *storming* as the new people challenge the existing norms and dynamics of the group.



Tips & Techniques for managing trustee / director relationships

1. Be honest, build trust and credibility
2. Communicate clearly
3. Build listening skills
4. Know your role: Board governs, director manages
5. Have a shared vision
6. Bring respect to every interaction
7. Act thoughtfully & carefully – don't react
8. Emphasize facts – gather objective information that will help you & the other person understand the situation
9. No new items on agenda – allows time to prepare
10. Behave professionally
11. Recognize temperament types & preferences of individuals & what the best approach is
12. Recognize roles people play on the board & use it to advantage
13. Be aware of the needs of your group in its current phase
14. Director's Report is an opportunity
15. Board decisions are shared decisions – make them by consensus