

Board Training Leader Notes:

Welcome all attendees and thank them for taking the time to attend. Let them know you hope to have them out in 90 minutes but 2 hours max. Suggest they have something to write with and on.

If a joint meeting do introductions.

Introduction – This compilation of ideas that you are going to be hearing about tonight stems from the vision of our International President and board. They took the time to compile excellent leadership speakers and tools to share with the Governors at their training in February and simply asked that the Gov try to impart what they had learned to the clubs in their district. This is an overview of what they learned and some tools that hopefully will be useful to you as you lead your club.

Notebooks: Shel's theme

Review sections: There are 5 sections to your notebooks: Leadership, Committee Chairs, Meeting Management, Membership and a section on documents.

Section 1 Leadership: If you can turn to the first page I would like to read a few comments from Gov Shelli. Leadership section: Proven Leadership: Work Smarter, Not Harder,

Close your eyes and think about the best teacher or leader you have ever had. What qualities about that person made them stand out to you? Please write down three Qualities.

Throughout our time together tonight you might want to think about this person and see if they have the qualities we will be taking about.

Page 3

– The Who of Leading and Managing **READ**

In most cases, a great leader is someone who paid attention to you. They didn't just walk in and give you marching orders, they got to know you and how you tick. Don't forget that your personal leadership style be it "that of the light" or "that of the darkness" will set the tone for your club and how all other things are accomplished.

Page 4 & 5 – The 3 Qualities of Effective Leaders, They are Inspiring, Stewards and Effective problem solvers

Inspiring:

Visionary READ

Supportive Coach

Effective Communicator

Role Model of Integrity READ

Stewards:

Customer Focused
Results Oriented
Demonstrators of Sound Judgment READ

Effective Problem Solvers

Analytical Thinkers
Innovative READ
Systems Thinkers

Page 6 & 7 – **Pseudo-Leader / Red Flags**

Review some of the characteristics of a Pseudo leader and Red Flags.

Then introduce the concept of “**Founders Syndrome**”. This exists in many clubs with members who are unwilling to make changes. “That is the way we have always done it” is a favorite line of these members. Often people with Founders Syndrome will display some of the traits of a pseudo leader. We are not saying that any of your members or even your club has Founders Syndrome, but if you recognize this as an issue you may begin discussion as how to best deal with it. They are road blocks to change.

Exercise – complete personality exercise with team

Have a flip chart or a board of some type to write on.

Have participants check off all traits from all categories that they believe are reflections of themselves.

Once done have the participants add each check and put in that quadrants box.

Once that is done, go through the difference of personality styles and some of the traits that leaders need to know to manage these people well.

Page 8 – Building a Cohesive Team

There are 5 Dysfunctions of a team.

1. Absence of trust
2. Fear of Conflict
3. Lack of Commitment
4. Avoidance of Accountability
5. Inattention to Results

If one or more of these areas is in trouble within your team you could have serious problems for the whole. Before continuing on, meditate a little on how trust is the foundation for all teams. Think about the motives of each person who is on the board and in the club. Think about melding individual personalities into a cohesive team and how to introduce the idea of openness, non-judgment and lack of personal agenda as the foundations for trust.

Page 9 – Overcoming the Five Dysfunctions

Something to consider as the leader. Make sure that the strategies for overcoming these things are known to the team and that people are ok with it. By talking about these topics frequently it abates the discomfort in the group and it becomes more conversational. **IT IS IMPORTANT THAT WE WATCH THE WAY WE TALK!** Try not to say “you”, “I”, “always” and “never”. If we appear to be accusing people in our language, people get defensive, shut down and don’t hear what you have to present.

Strategy for overcoming the 5 dysfunctions

1. Absence of trust - Identify and discuss individual strengths and weaknesses
2. Fear of Conflict - Acknowledge that conflict is required for productive meetings
3. Lack of Commitment - Review commitments at the end of each meeting to ensure all team members are aligned
4. Avoidance of Accountability - Explicitly communicate goals and standards of behavior
5. Inattention to Results - keep the team focused on tangible group goals.

Page 10 – Table Discussion

We have another exercise for you which may be difficult as you have not gelled as a team yet so early in the year. But let's give it a try and see how it goes.

Give participants a few minutes to write answers to these questions. I would like to add an additional question after each of these, of how you would propose to solve the problem.

Discuss thoughts and how to solve.

Page 11 – Mastering Conflict

The second issue that will destroy a team is conflict. **READ** It is very important that people understand that healthy debate within groups is encouraged. It is super important that it is always non-personal. The behavior or problem just needs to be out there and all should be heard on the matter.

Page 12 – Mastering Conflict

Ask each participant to answer the questions. Then consider how different behavioral profiles might need to change the way they speak to each other. For example; how might a Dove feel when conflict exists? (a Dove may shut down and not respond) this really goes back to trusting each other and that remembering that what is being said should not be taken personally but for the good of the Team.

Page 13 – Achieving Commitment **READ**

This is basically the “wrap up” for the leader to verbally reiterate what each person's assignment or expectation is and the date and method for delivery to have it completed. Not only does this clarify the role/expectation for each person, an implied accountability is placed.

Page 14 – Embracing Accountability

Review accountability. **READ** section

During Shelli's training Allison had a conversation with them about being able to trust each other enough to be able to address things that may bring the team down without it being a direct insult to anyone. This is very hard to do.

As an example something that might need to be addressed is say if Suzie Q didn't find out about the location for the event and advise others as she stated she would at the last meeting, how would you as a board handle this? Normally we would just say ok and wait for her to get around to it. In this scenario we should be proactive and ask if there is something precluding her from getting the work done, has her schedule changed and now she finds she can't get it done, would she like someone else to take over etc.

As a reminder when giving assignments we need to also give deadlines and when we say we will take on a project it is a little contract that we don't want broken.

Page 15 – The Meetings Quiz, this is an exercise that I would like to recommend that you do as a group after you have all attended 3 or 4 board meetings then take it again at the end of the biennium in April or May to see what progress you have made.

Page 16 – Meeting Quiz Score This will follow the quiz they do in a few months

Page 17 & 18 – Cover Tactical Meeting Guidelines

This is a tool that can be used at board meetings. Page 18 is outline for how to use it at a meeting.

Page 19 – Focusing on Results

Are you meeting your goals? Is the team unified? Is the mission being met? Is your team growing in its trust and ability to communicate and get things done?

Then **READ** the beginning paragraph.

Scoreboard- tool for quickly assessing a team's success

Team-based Rewards- may not work as well for volunteer organizations

Team #1- Confirm that the team priority is in order not your own dept or divisions.

Page 20 – Team Assessment

In addition to assessing the goals and objectives, the team should also be assessed. The suggestion is that you wait on doing your own assessment until 3 months have passed. At that time you would complete page 20 and 21 and then each quarter redo the assessment to determine the progression.

Break

Section 2 The Club Board and Committee Chairs:

Gathering Your Team

It is suggested that the President be engaged in asking their committee chairs to serve. Don't underestimate the power of the "ask". Often people are willing to serve but don't think they are needed because they have not been asked to help.

There is another motive at work here as well. As the leader, you are responsible to make sure that the information you need to complete your job is available to you. Choose team members who show strengths in communication, task completion and a willingness to cooperate. Above all these members will be people who will complete the tasks required and include as many other members as possible; educating and being educated along the way.

The board will set the tone for the way the rest of the club approaches leadership opportunities. Gather your team, chart a course and create an environment where all members can succeed and thrive. Then watch the behavior emulated back in the broader membership.

Suggest they review the Human Resources (volunteer) Building Cycle on page 6

Page 10 lists 10 things organizations should remember when recruiting young people for their board.

Focus- meeting must be well run and relevant to strategic plans and mission

Action- young people want to be change agents, they do not want to talk about issues month to month or meeting to meeting.

Growth- young board members need a mentor to help them learn the etiquette and process of board leadership.

Skills- They will have their own set of skills that older members can learn from such as technology and marketing.

That leads us into the "*Baby Judge Concept*" Have any of you heard of this? Be aware of your audience at meetings and during discussions and ask a newer/younger members for their opinion. They will normally not speak up to start with so calling on them is a great way to bring them into the fold and let them know their opinion is worth hearing.

Buckingham 12

This is especially important for the President or any other leader who is charged with having people working under them such as board members and committee chairs. They need to make sure all these questions are answered for each position. Each chair or board member should be proactive and look at these items and ask about anything they don't understand. This would especially be useful for the Nominating committee when seeking members for office.

Do a quick review of standing committees.

Section 3 New Concepts in Meeting Management:

Getting on the same page: READ entire page.

Attendance read highlighted ones, ask for thoughts?

Productive Board/Business meetings: Read highlighted ones:

Review Strategic plan document

Introduce the concept of consent agendas.

Minutes from prior meeting, treasurers report, committee reports.

These would be sent out via email a week prior to the meeting, noting the attachment are part of the consent agenda. Include a summary of what a consent agenda is and how it works. Explain that all members must carefully review the items included and can raise questions or concerns at the meeting. During the meeting the President would ask if an item on the consent agenda needs further review or discussion, if no you move on without discussion if yes then you would open that specific item in the consent agenda open for discussion. Leaving time for education of our membership on relevant issues.

Hand out ZI Project information as a sample of Education that can take place.

Introduce the concept of active participation and debate in the club. Review the list of Tips for Robust Discussion as highlighted. Ask the President to lead the discussion to determine the final decision of the club.

Sample meeting minutes enclosed.

Section 4 Membership:

READ entire page:

We just mentioned the concept of membership as an outcome of providing leadership and being known as an organization that can build good effective leaders. ZI will survive with the addition of the “millennial” member and we have to learn how to include them.

ZI to be known for providing Leadership Skills....

Section 5 Documents:

Highlight communication tree. Contact information in Notebook
Club President to Area Director
Area Director to the Governor

Encourage committee chairs to contact the Dist 8 Committee chairs for guidance etc. Contact info in notebook.

How to find things out. Use the ZI Website www.zonta.org Use of Drop Box. Pass on information as the President and Committee Chairs.

Collect the secondary contact person’s name.

At the beginning of the training I asked each of you to write down the name of the best teacher or leader you have ever had. Thinking about what we have discussed it takes to make a good leader, would your candidate qualify?