Financial Horizons Credit Union Team and Leadership Development Retreat

Speaker Biographies and Presentation Materials

October 10, 2016

The Gold Room
Multi-Purpose Building
225 Sheckler Road
Fallon, Nevada  89406

University Center for Economic Development – Nevada Leadership Program
http://www.unr.edu/business/research-and-outreach/nevada-leadership
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Frederick Steinmann currently works for the University of Nevada, Reno and the University Center for Economic Development. He began his professional economic development career with the Reno Redevelopment Agency in the City of Reno, Nevada. Since then, he has worked for the Nevada Small Business Development Center, Bureau of Business and Economic Research, and for the Carson Economic Development Services Department in the City of Carson, California. Frederick has also worked as a Senior Associate for David Paul Rosen & Associates, one of the elite economic development and public policy consulting firms in California. Frederick earned his Doctorate in Policy, Planning, and Development, with areas of study including economic development, public policy, public finance, and real estate development, from the University of Southern California with the successful defense of his dissertation titled, “The Twilight of the Local Redevelopment Era: The Past, Present, and Future of Urban Revitalization and Urban Economic Development in Nevada and California.” He also earned a Bachelor’s of Science and Masters of Science in Economics from the University of Nevada, Reno.
Presentation Materials
Welcome!
Nevada Leadership Program
Financial Horizons Credit Union Team and Leadership Development Retreat
October 10, 2016

Objectives
The Nevada Leadership Program:

– Main Objective: To create a pool of qualified officials as the difficulty of challenges in Nevada grow; officials who understand the ins-and-outs of government Management and Administration.

– Secondary Objective: To reduce conflict between staff and elected/appointed officials over procedural matters pertaining to government Management and Administration.

Objectives
Financial Horizons Team and Leadership Development Retreat:

– Explore the various qualities of effective leadership.

– Develop your motivation and coaching skills as a leader in your organization.

– Explore different aspects of team building.

– Explore different problem solving and conflict resolution skills.
Our “First” Exercise

What is Leadership?

- As an **individual**, write down an answer to this question on the index card provided on your table. Think about qualities, responsibilities, activities, etc.

- As a **group**, and using your individual answers, write a single sentence on the flipcharts provided for your group.

- As a **class**, we will discuss and share our answers.

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The Agenda

An exploration of different aspects of leadership:

1. What is Leadership?
2. Exercise: Matching Your Leadership Styles with Team Leadership Needs (Part A and Part B)
3. Being a Leader: Motivation and Coaching
4. Being a Leader: Building a Team Environment
5. Building Trust, Collaboration and Resolving Conflict

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What is Leadership?
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What is a Leader?
“Responsible administrators must be able to account for their conduct to relevant others, such as supervisors, elected officials, the courts, and the citizenry, which means being able to explain and justify why specific actions they took resulted in particular consequences.”
Terry Cooper, “The Responsible Administrator: An Approach to Ethics for the Administrative Role”

“The ability to give help and receive help.”
Chester Newland

Qualities of a Leader
• Leadership is the capacity to influence others to achieve worthwhile results.
• Personalities Qualities
• Mental Qualities
• Value Systems
Personality Qualities of a Leader

- **Emotionally Mature**: comfortable with themselves and accept their own faults and abilities; predictable and dependable.

- **Independent**: free thinkers; not afraid to disagree with the majority; question and are willing to change policies and procedures.

- **Strong-Willed**: determined; overcome obstacles to achieve goals.

- **Courageous**: willing to take risks and are not afraid to fail.

Personality Qualities of a Leader

- **Ambitious**: strong desire to achieve and they are willing to work longer and harder to do so.

- **Resilient**: continue to perform despite delays, disappointments, distractions, or failures.

- **Charismatic**: capture the ‘popular imagination’; they inspire.

Mental Qualities of a Leader

- **Quick**: think rapidly; can analyze situations and alter plans accordingly.

- **Knowledgeable**: leaders know their organization, its practices, and its culture.

- **Good Judges**: form opinions and make decisions objectively and wisely. Their opinions and decisions reflect the goals of the organization and society in general.

- **Foreseeing**: look ahead, predict what will happen, and plan for it.
The Value Systems of a Leader

"Values are our beliefs and principles by which we live. **Our values shape our personality, attitudes, and style of leadership.** Values (should be) positive and constructive. For example, a person who values good health may exercise, eat healthy foods, and read health-related magazines. Similarly, leaders who value quality workmanship will establish goals that insure quality."

Leadership Style

"Great leaders may be very different in their approaches. They do not lead people in the same way. **The difference in leadership behavior is called style...** Your leadership style, or pattern, is an expression of your personal orientation to several key aspects of leadership: (1) how you think, (2) how you influence others, (3) how you guide the day-to-day actions, and (4) how you employ structures (rules, policies, and systems)."

Measuring Leadership Style

The Four-Dimensional Model of Leadership Style:

1. **Reflection:** the extent to which they evaluate the situation and the challenges facing the organization, clarify the vision and mission, set the direction, establish priorities, and make plans.

2. **Influence:** how much they work with and through the talents of the team members; leaders must mobilize the skills, experience, viewpoints, and energies of the team members using personal persuasion, role modeling, idea selling, and hands-on authority.
Measuring Leadership Style

The Four-Dimensional Model of Leadership Style:

3. **Action**: how they tell people what to do; highly directive or highly permissive; can directly channel the team’s activities or allow the team to act intelligently on its own.

4. **Structure**: how they create structures for assigning responsibilities, communicating, sharing information, planning, managing resources, and resolving disagreements.

The Leader Match Principle

“All of the examples so far have one thing in common: they do not account for differences in the situations the leaders must face. Clearly, a person with a very distinctive leadership style might be very effective in one situation and completely ineffective in a different situation. To better understand the whole picture of leader effectiveness, we have to bring together the elements of the enterprise, the team, and the leader. This is the ‘leader match’ principle.”

Exercise No. 1 – Matching Your Leadership Style with Team Leadership Needs Part A

**Goal**: To allow you the opportunity to recognize your individual leadership style.

**Time Allowed**: 15 minutes.

Complete the “Assessing Your Leadership Style” Part A assessment and scoring form provided.

As a group, we will discuss:

- How accurately do you feel the profile describes your leadership style?
- Does your profile surprise you in any way?
- How would this behavior pattern appear in interactions with your team?
- Do you have a strong point that, if taken to the extreme, could become a weakness?
- Under what circumstances might this leadership assessment give you unreliable or unrealistic results?
- Under what circumstances might your leadership style be least effective?
Exercise No. 1 – Matching Your Leadership Style with Team Leadership Needs Part B

Goal: To allow you to recognize your individual leadership style.

Time Allowed: 15 minutes.

Complete the “Assessing Your Leadership Style” Part B assessment and scoring form provided.

As a group, we will discuss:

- Is there anything unique about the current situation facing your organization and/or team which indicates a need for certain aspects of leadership?
- How is the need for leadership likely to change over the near term, and how might it be different further in the future?
- Do team members understand clearly what the mission of the organization is, and if so, do they embrace and support it? Do they understand the challenges they must face in accomplishing the mission?

Evaluating the Leadership Gap or Match

Follow-Up, Estimating Your Leadership Gap or Match:

- Subtract the results of Part B from Part A for each of the four sections (Reflection, Influence, Action, Structure).
- Leadership Gap: Where is the area of greatest difference between your score and the team’s needs score?
- Leadership Match: In what areas are your score and the team’s needs similar?

The Strength-Weakness Irony

“Each of us has certain strengths that we have learned to use for our own benefit and for the benefit of others. But one’s strengths can sometimes become a liability. Psychologists refer to a principle known as the ‘strength-weakness irony’…one’s strength, such as a particular attitude or skill, when taken to an extreme, can actually become a weakness.”
The Strength-Weakness Irony

Examples:

- **Confidence**: can extend to overconfidence and arrogance.
- **Determination**: can extend to stubbornness and unwillingness to recognize and correct mistakes.
- **Participatory Decision-Making**: can extend to ‘wishy-washiness’ and trying to please everyone.
- **Analysis**: can turn into an inability to take action.

Understanding Your Leadership Style Means:

- Understanding your strengths, knowing how they can sometimes become a weakness.
- Knowing how your style influences the attitudes, feelings, and actions of others.
- Knowing how to alter your behavior patterns to meet situational challenges and team needs.

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Characteristics of an Effective Leader

“Every team has at least one leader – someone who sets a course for team members to follow. A leader is a positive influence on the team, helping members to function productively and deliver quality performance.

Leaders have a challenging task indeed. If you want to be an effective leader, you must be able to meet this challenge. You must have the skills necessary to lead your team.”

Characteristics of an Effective Team

What Makes an Organization Successful?

- Qualified Members
- Concern for Achieving Goals
- Commitment to the Team and Organizational Goals
- A Constructive Climate
- Creative Members
- Structure within the Organization
- Strong Leadership
- Members who Enjoy their Work
What things make your work enjoyable and fulfilling?

“Contracting” Expectations

“Team members must find their work fulfilling and rewarding…leaders have the same expectations and needs that their work must fulfill, and they have to meet the expectations of their team members.

These mutual expectations between leaders and followers are called contracts. A contract is developed when leaders and followers must depend upon one another for achievement of personal goals and personal fulfillment….a set of expectations communicated to others through writing or speech which sets conditions to an agreement.”

What are some examples of contracts within your organization?
Motivating Organizational Members

“Motivation causes people to behave in certain ways to achieve goals. It is what one chooses to do when faced with alternatives, the strength of that behavior once a choice is made, and the persistence of that behavior. Motivation guides virtually all of our activities. We eat because hunger motivates us to do so. We work because our needs for money and personal fulfillment motivate us.”

Motivating Organizational Members

The Expectancy Model (Victor Vroom):

– The strength of the motivation is based on: (1) the perceived value of the result of performing a behavior, and (2) the perceived probability that the expected behavior will cause the desired result to occur.

– Motivation of people occurs as we increase ‘motivation strength’: (1) helping members visualize the benefits, and (2) helping members believe that the goal will be achieved.

Motivating Organizational Members

The Expectancy Model (Victor Vroom):

– Make expectations clear.

– Tell members the benefits they will receive when they succeed.

– Recognize the work of organizational members.
Motivating Organizational Members

Some General Guidelines:

– Tell people exactly what is expected of them.
– Make certain the reward suits the person’s needs.
– Reward the desired behavior as often as it takes to maintain it.
– Reward desired behavior immediately.
– Use reward over punishment every time.
– Reward only when it’s deserved.
– Be a good model.

What rewards within your organization have a positive impact on individuals within the organization and on the organization as a whole?

The Importance of Coaching

“Coaching is essential to reinforce the training that people receive. Yet it slips to a low priority because of other responsibilities leaders have. Also, many leaders are reluctant to coach because they view coaching as criticism. They feel uneasy about giving negative feedback to people.”
The Importance of Coaching

Organizational Benefits of Coaching:

– Helps team members see and build upon their own strengths and weaknesses.

– Helps team members to analyze their own performance so that they are able to work on their own development.

The Importance of Coaching

“…a coach’s role also is that of leader, teacher, and facilitator. Any positive reinforcement is a response to specific accomplishments.

Coaching is a continuous process, not something that is done once in a while. A coach must constantly observe and give feedback to ensure that goals are met.”

A 10-Step Coaching Process

1. What are the unacceptable behaviors?
2. Is the problem worth the time and effort?
3. Does the team member know what unsatisfactory performance is?
4. Does the team member know what is supposed to be done and when?
5. Are there obstacles beyond her/his control?
6. Does the team member know how to do it?
A 10-Step Coaching Process

7. Does a negative consequence follow performance?

8. Does a positive consequence follow non-performance?

9. Could the team member do it if she/he wanted to? If "yes":
   - Get agreement that a problem exists.
   - Discuss solutions.
   - Agree on actions to be taken.
   - Follow up.
   - Recognize accomplishment.

10. Redirect team member’s behavior through coaching.

Our Second Exercise – Coaching

Goal: To provide practice in coaching team members to improve performance.

Time Allowed: 20 minutes.

At each table, designate one person as “Leader”, one as “Team Member”, and everyone else as “Observer”.

- Leader and Team Member will role play the assigned scenario; the Leader will act as a coach.
- Observer will note findings and report them at the end: (1) How did the coach present the problem? (2) What style of leadership (direct, indirect) was used? (3) Did the team member participate in the discussion? (4) Did the team member agree/disagree with the coach? (5) What was the final result of the discussion?

Scenarios:
- (A): Your city or county parks and recreation department is undertaking a multi-million dollar capital improvement of the community’s parks. One staff member refuses to follow established procedures related to your organization’s public contracting policies. The staff member has worked for your organization for over 10 years and has previously been recognized for exemplary performance on other major projects.
- (B): Your company has put you in charge of its manufacturing assembly line. You develop a plan to increase production and the line supervisor has decided to implement it. However, you have seen no production increases on the assembly line since the plan was implemented over a month ago. You suspect that this is because a key team member has opted to ignore the plan.
The Rise of the Team

"...in businesses and other organizations around the world, people are talking about teams. They use such words as ‘teamwork’, ‘being a team player’, ‘project teams’, ‘work teams’, ‘team leaders’, and ‘superteams’. The days of the directive or authoritarian-style leaders, when the boss tells everyone what to do and everyone does it without question, are fast disappearing. They are replaced by team environments, where a group of people working together determine goals and plans and share the work."

What is it?
The Network

- Growth in Complexity – Don Kettl (Is the Worst Yet to Come?) and “Wicked Problems”
- New Public Management – it’s rise in the 1980’s; current decline?
- New Ways of Thinking: Quantum Mechanics, Chaos Theory, Systems Dynamics, Biology, etc.

The Rise of the Team

- Why has the team (or collaborative) framework risen in popularity?
- Benefits:
  - Work becomes less stressful because both the work and responsibility is shared.
  - Increased productivity, morale, loyalty, and retention.
  - Stimulate creativity leading to better products and services and reduced costs.

Authoritarian vs. Team Leadership

The Authoritarian Leader:
- Assumes responsibility for the group and will try to control all aspects.
- Makes all the decisions and does not accept input.
- Tells everyone what to do…no input on goal-setting, planning, delegation of work, or problem-solving.
- Avoid conflict by suppressing or ignoring problems.
- Discourages commitment by not allowing group members to participate.
Authoritarian vs. Team Leadership

The Team Leader:
- Shares responsibilities with members of the team.
- Facilitates group problem-solving.
- Asks others for input and welcomes feedback and suggestions.
- Encourages three-way communication (up, down, and horizontal).
- Addresses conflict immediately; views conflict as positive.
- Fosters commitment by letting team members participate and contribute.

Encouraging Commitment

“A team is most productive when it is committed to the goal and makes the full use of each member’s talents. For commitment to occur, team members must feel responsible for what the team does, as well as for what they individually contribute.”

Encouraging Commitment

Team Leaders can encourage commitment by involving team members in:
- Goal Setting
- Planning How to Achieve Goals
- Problem-Solving
Our Third Exercise – Building Commitment

Goal: To help build commitment to working as a team; to help individual team members articulate their reasons for wanting to be committed to teamwork.

Time Allowed: 10 minutes.

Scenarios:
– (A): Your company has been losing money on its products for the past two years. Other companies are producing the same products with better quality and at a lower cost. Your company is planning one last effort to improve its market position. Your division/leader has asked for you and a select group of employees to tackle the problem of producing one key product that will be of better quality at a better price than others on the market. List who should be part of your team and the reasons why it is in the best of interests of your team to commit to their team and its goal.
– (B): Your city or county planning department is considering issuing a special use permit for a new shopping center that will significantly increase traffic in an area near a major high school, an assisted senior living facility, and several existing residential homes. Your planning director has decided to put together a team to discuss the potential impacts regarding this proposed development. List who should be part of your team and the reasons why it is in the best of interests of your team to commit to their team and its goal.

Building Collaboration through Communication

- Successful Teams Communicate Three Ways:
  – They share information.
  – They provide feedback.
  – They encourage participation.

- Tips for Improving Team Communication:
  – Communicate directly.
  – Keep the message simple.
  – Provide clear explanations.
  – Use the right medium.

Building Trust

In teams, trust must occur:

- **Among team members**: each team member must feel that they have the support of other team members (reciprocity).
- **Between the leader(s) and team members**: leaders must have the trust and confidence of their team members (leadership).
Building Trust
As Team Members:
– Communicate openly and honestly.
– Listening (vs. hearing) to and respecting other’s opinions.
– Demonstrate commitment.
– Display loyalty.

Building Trust
As Team Leaders:
– Communicate openly and honestly.
– Listening (vs. hearing) to and respecting other’s opinions.
– Display loyalty.
– Be decisive.
– Be fair.
– Be consistent.

Resolving Conflict
Conflict is generally caused when the actions of one person violates the expectations of another:
– Differing needs, objectives, or values.
– Differing expectations of results.
– Differing perceptions.
– Unwillingness to resolve the conflict.
Resolving Conflict

Five Methods of Resolving Conflict:

- **Avoidance**: ignore the conflict and hope the best.
- **Accommodation**: sacrifice one (or more) party(ies) for the betterment of the group.
- **Win/Lose**: a competitive strategy where one person/party uses threats, pressure, or intimidation to achieve their objectives.
- **Compromise**: both parties search for a mutually beneficial solution; each giving up something in return for something.
- **Consensus**: when a proposed solution(s) satisfies the major beliefs, interests, and needs of all parties.

Resolving Conflict

Paving the Way to Conflict Resolution:

- Understanding of the problem.
- Joint responsibility for solving the problem.
- An opportunity to speak and voice individual concerns.
- A binding quality where all parties feel they have recourse if others fail to live up to their promises.
- Something gained.
- Receptiveness.

Resolving Conflict

To Reach a Consensus:

- Encourage everyone to speak.
- Emphasize areas of agreement.
- Determine seriousness of objections and disagreements.
- Continually sum up areas of agreement and mutual understanding.
Our Fourth Exercise – Resolving Conflict

Goal: To provide practice in resolving conflict in a team environment.

Time Allowed: 10 minutes.

Scenarios:

– (A): A team of your company’s employees recently developed a new production process. Using this new process, the company can produce a better quality product at a better price in less time than other manufacturers. The first shipment of the product created with this new process is set for distribution in four days. However, a team member discovered that the product will fail under certain conditions. Some team members want to stop delivery. Some team members want to go forward with the distribution as scheduled. Discuss the problem and decide what solution(s) the group thinks is best.

– (B): Your city or county planning department is considering issuing a special use permit for a new shopping center that will significantly increase traffic in an area near a major high school, an assisted senior living facility, and several existing residential homes. Your team has discovered several important impacts that need to be addressed (traffic concerns, public safety, increased demand on the sewer system, storm runoff, impact on property values, etc.). Discuss the problem and decide what solution(s) the group thinks is best.