"Leading People You Don't Manage"

Middle Management Series

LLAMA

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Why should we look at issues and practices about "leading people you don't manager?

In today's environments, individuals lead and are led by their administrators and by their managers but also - for much of the work accomplished - through teams and other work groups. In many instances and through a variety of organizational arrangements such as matrix management, people lead and are also led by OTHER managers (not-their-own) in the organization as well as by their peers. In addition in some functions, in project management processes, within collaborations and partnerships and in association and community work activities (to name just a few areas) people are led by not only by "non" managers, but by individuals little known to us and often not in our organization and sometimes not even in our field.

Current overall training in leadership - in both basic and advanced leadership curriculum - typically focuses on teaching people how to lead their entire organizations and, more specifically, their own employees. That is, training focuses on how to lead the groups they supervise and the people they manage. While it is important for training content to include that leadership, and while there is obviously overlap in content, the reality is that leading people you DON'T supervise or have clear authority over is not the same. Most content does NOT emphasize enough – or even at all - the competencies needed for leadership of both internal and external peers, committees, workgroups and/or teams/team members or those people we might not supervise in any way as well as leadership opportunities with entities including umbrella structures, external organizations, communities, advisory groups (and even governing groups), associations, partnerships and consortia.

Okay, so one more time…what do leaders do and what is leadership?

In today's online and wiki environment, we can find dozens of definitions of anything. The list below excerpts *elements* of definitions, some similar in content but typically different wording or different phrases. Elements include:

- Leaders influence others to accomplish a mission, task, or objective.
- Leaders focus on cohesiveness.
- Leaders have interpersonal influence and direct it toward the accomplishment of organizational vision, mission, outcomes and goals.

The leadership process includes:

- The leadership process includes the application of basic leadership attributes (belief, values, ethics, character, attitude (a competency) as well as organizational competencies such as knowledge and skills and abilities.
- Leader makes people want to achieve high goals and objectives, vs. the manager or boss who tells people to accomplish a task or objective.

  Leadership:

    1. Differs from management
    2. Requires "followership"
    3. Can be learned but interest in and personal commitment to are critical to the learning process
    4. Is best accomplished with a "situational approach"
    5. Involves thinking strategically about the organization
    6. **Involves thinking strategically about staff including knowing/understanding and focusing on those you lead and how the task at hand needs to be matched to those involved**
    7. Involves taking educated risks
    8. Emphasizes resolving conflicts and solving problems appropriate to the task at hand (not necessarily conflicts between/among followers)
    9. Is committed to serving as a model which might include training others to be leaders

So what are the issues? Just a few in general include:

1. Current focus on outcomes in organizations highlights a wide variety of accomplishments (job functions, HOW things are accomplished, etc.)

2. Need for internal and external opportunities for people to learn to lead initiatives when they don't manage the function

3. Need for internal and external opportunities for people to learn to lead initiatives when they don't manage at all

4. Provide experiences and training on how to successfully accomplish experiences for those who don't want to manage people "full time"

5. Incorporate new areas of training including retirements/succession management preparation

6. Increasing opportunities for leading very different internal library populations and different environments with vastly different timelines (and not necessarily librarians)

7. Leading very different organizations "contiguous" to organizations (partnerships, shared use, cooperatives and collaborations)

8. Leading very different organizations/people organizations

9. Leading very different organizations external to umbrella organizations

10. Need to training/educate for expanded leadership without authority issues

11. Need to address, revise expanded communication for breadth of leadership

12. Variety of leadership styles of all involved

13. Match of variety of management styles to leadership styles of all involved

14. Specific organizational issues including unions, individuals doing more than one job, the daunting task of "just getting things done"

15. "Generational" issues…"experience" issues of leading others

16. **The difficulty of leading those ABOVE you in the organizational or umbrella structure or related organization or community "food chain."**

A leadership "to do" list includes the articulation of overall fact that leaders must build in leadership to their goals and their operations by…

1. How are staff members expected to "follow?"

2. Are leadership elements spelled out in job descriptions? Group mission, goals statements?

3. How does administration expect staff members to lead in their work environment? In their professional environment and often most importantly in their umbrella organization?

4. What specific opportunities for leadership ARE there? Teams? Special Projects?

5. Is leadership training supported? Planned for? Paid for?

6. How will individuals be lead and how/will that vary from team leadership?

7. How will staff members supposed to transition to leadership positions within the management structure and exclusive of the management structure?

8. If mentoring is involved (and all good leadership has mentoring) who/how is mentoring honored? Specific plans/responsibilities must be outlined for managers and employees.

When leaders don't supervise the people they are leading in a project, task, etc. best practices include:

1. Leaders articulating outcomes needed and overall vision of the function or activity at the first of the process and DON'T rely on existing relationships or more standard or typical service or job functions.

2. Individuals should choose a specific style to work with their followers and situational leadership as the primary leadership style for working with people you don't supervise is recommended.

3. Leaders should "study" group members in the context of the task at hand and not rely on general knowledge.

4. Leaders and the overall administration must decide on specific parameters of leadership functions that recognize the "non-management" role… that is addressing areas such as:

    a. Who establishes group dynamics? Group behaviors?
    b. Does the leader handle problems with dynamics or behaviors or conflicts which arise in the (team, group, etc.)?
    c. Does the group leader contribute to the evaluation of those involved in the (team, group, etc.)
    d. If the leader does contribute to evaluations, how?
    e. When the leader is not meeting outcomes, who reports? Who handles?

5. Leaders should ensuring that follower relationships are articulated as such…that is, x leads this group which means **they do….and they don't do** (examples above).

6. Identify for group members what leaders do and don't do. (Communicating 4 a-e)

The leader leads by:	More management responsibilities:
----Making employees aware of the context and importance of the outcome for the organization *Let me tell you how this matters to the organization and our constituents.*	Stating an outcome and what needs to be done or how to get there…
----Making employees aware of the context and importance of the outcome for the employee *Let me tell you how this matters to YOU.*	Identifying who does what to accomplish or who does what after the accomplishment is completed.
----Working with staff to get them beyond themselves and focusing on the team Let's create a plan for what we do individually and what we do together that includes our work plan, timeline as well as what we expect of each other.	Telling individuals what their responsibilities are.
----Exhibiting trust, confidence *I think we are good at this because…* *I think we were chosen or "you were chosen" because…*	Establishing a timeline and work plan.
----Exhibiting excellent communication skills *What's the best way to communicate to establish, maintain, and implement how we will share our needs, accomplishments given our specific project?*	Using standardized organizational paths of communication.

Example:

Facilitating an assessment of the organization with a vision to reorganization	
Managing functions	**Leadership functions**
Interviewing who assigned you the task	Establishing parameters for the task and requesting the process to include involving others in a variety of stages if decision making – for example – would NOT be their purvey
Listing what needs to be done with the project	Identifying what the leader does and doesn't do in the project and who – if allowed – should be informed/involved throughout the process and identifying what other data (other organizations) can be used.
Writing a project "to do" list/goals/outcomes statements	Chooses an assessment advisory group and identifies what the group does and doesn't do. Has group establish processes for ongoing communication with organization about the project and identifying timeline, impact and "change" issues implied by the topic at hand
Assessing last year's goals to determine what was done/what happened	Assessing, connecting with levels in organization for informing and asking for clarification if needed and establishing everyone's "role" in the process for general communication/keeping up
Designing a survey with a cover letter to send to pertinent individuals	Asking for input on data-gathering/survey which might include: …Designing – with advisory group – best framework for seeking input from the group/the organization in general …identification of final decisions since it MIGHT involve great change and upheaval
Gathering data by …. assessing survey results …..follow up interviews for clarification	Inform more rather than fewer people of the stages of the organization

Reviewing data, making decision, articulating how, why, direction and timeline	Seek clarification or produce leader/group updates to all
Decision is recommended	Groups are involved in review of decision, multiple choices are given, how decision will be made is outlined for all
Decision is made	Decision is made, all in the organization have the timeline updated
Changes made distributed with organizational and – as needed - client impact statement with timeline	Discussion is generated on how to roll out and Changes made distributed with organizational and – as needed - client impact statement with timeline with impact statements on organizational departments and individual jobs along with a list of expectations for those immediately involved, those tangentially involved and those not involved

How leaders make "their" vision work and ensure the success of the organization when they don't supervise:

1. Leaders must believe in the vision or mission of the project/activity/task at hand and specifically, the accomplishments needed.

2. Leaders – if needing to alter or change - must plan specifically for "change" FIRST and the concept of change ...what it means, what it brings and how it affects individuals and teams and the organization as a whole.

3. Leaders – if not designing their own process, must believe in the process handed to them.

4. If they are designing new processes, leaders must consult followers on processes needed to accomplish.

5. Leaders must articulate what they do and don't do.

6. Leaders must do MUCH more than "delivering one person's vision."

What leadership style is recommended when you don't supervise those in the process, initiative, etc.?

Situational Leadership, as a style of leadership, offers a variety of ways to work with "followers." Primarily because:

People handle different people and different situations in different ways.

Different situations call for different elements of leadership.

Different outcomes may need different approaches.

A leader **must be** flexible.

The most flexible style of a leadership, situational leadership is attractive for many reasons. Primarily this style allows for the greatest number of factors to be taken into consideration before the "right way to do something" or "the best way to lead" is chosen. Leaders explain to "followers" that – depending on the situations and elements of the work to be accomplished, leading the group may vary. The four basic ways to work with people include the following and leaders reorganize and use as needed. To accomplish and lead, leaders may have to:

SELL people on what needs to be done

CONSULT with people on how the accomplishments are made/outcomes are realized

JOIN in with others to make a final choice. **(In many articulated leadership activities, this element is used much less than "sell" and "consult" as leaders – ultimately achieve leading other – join in the discussion but often make the final decision.)**

TELL people what is to be done ….**(In many articulated leadership activities, this element is NOT used or used as a last resort as leaders – ultimately achieve leading other – by not telling their members/groups/followers but leading the group in making choices.)**

So what are the issues AND SUGGESTIONS?

1. Current focus on outcomes in organizations highlights a wide variety of accomplishments (job functions, HOW things are accomplished, etc.)

INCLUDE LEADERSHIP OUTCOMES IN THE BUILDOUT OF EACH INTIATIVE OUTCOME SO IDENTIFY WHAT ARE MANAGEMENT ACTIVITIES VS. LEADERSHIP ACTIVITIES OF ORGANIZATIONAL GOALS/OUTCOMES.

2. Need for internal and external opportunities for people to learn to lead initiatives when they don't manage the function

ADMINISTRATION SHOULD IDENTIFY SPECIFIC ONGOING AND AD HOC AREAS, ACTIVITIES– IF WANTED BY EMPLOYEES - OR REQUIRED BY THE ORGANIZATION – WHERE PEOPLE CAN LEAD IF THEY DON'T MANAGE A SPECIFIC AREA.

3. Need for internal and external opportunities for people to learn to lead initiatives when they don't manage at all

ADMINISTRATION SHOULD IDENTIFY SPECIFIC ONGOING AND AD HOC AREAS, ACTIVITIES– IF WANTED BY EMPLOYEES - OR REQUIRED BY THE ORGANIZATION – WHERE PEOPLE CAN LEAD IF THEY DON'T MANAGE AT ALL.

4. Provide experiences and training on how to successfully accomplish experiences for those who don't want to manage people "full time"

- IDENTIFY TRAINING FOR MANAGERS AND NON MANAGERS
- IDENTIFY MANAGEMENT EXPECTATION FOR MANAGERS AND NON-MANAGERS AS TO LEADERSHIP.
- IDENTIFY MANAGEMENT EXPECTATION FOR FOLLOWERS EITHER OVERALL OR FOR SPECIFIC INTIATIVES.

5. Incorporate new areas of training including retirements/succession management preparation

- IDENTIFY/ADDRESS MANAGEMENT/ORGANIZATIONAL EXPECTATIONS FOR SUCCESSION PLANNING FOR INTERIM AS WELL AS PERMANENT, CAREER LADDER OPPORTUNITIES AND

EXPAND CAREER LADDER TO EXPERIENCE WITH TEMPORARILY AS WELL AS PERMANENT EXPERIENCE.

- IDENTIFY/ADDRESS MANAGEMENT/ORGANIZATIONAL PARAMETERS FOR SUCCESSION PLANNING FOR INTERIM AS WELL AS PERMANENT, CAREER LADDER OPPORTUNITIES AND EXPAND CAREER LADDER TO EXPERIENCE WITH TEMPORARILY AS WELL AS PERMANENT EXPERIENCE.

6. Increasing opportunities for leading very different internal library populations and different environments with vastly different timelines (and not necessarily librarians)

ADDRESS ORGANIZATIONAL TIMELINES FOR ALL RELATED, SURROUNDING ENTITIES (THUS ADDING TO THE ORGANIZATIONS "CLEARINGHOUSE OF LEADERSHIP …AND MANAGEMENT…TOOLS (PARADIGM SHIFTS)

7. Leading very different organizations "contiguous" to organizations (partnerships, shared use, cooperatives and collaborations)

ADDRESS PARTNER, ETC. PROFILES TO EDUCATE/TRAINING EMPLOYEES ON OTHER TYPES AND SIZES OF ENVIRONMENTS. (PARADIGM SHIFTS)

8. Leading very different organizations/people organizations

PREPARE SWAT ASSESSMENTS FOR CONTIGUOUS ORGANIZATIONS TO ADD TO CLEARINGHOUSE DATA. (PARADIGM SHIFTS)

9. Leading very different organizations external to umbrella organizations

IDENTIFY PARAMETERS (PARADIGM SHIFTS)

10. **Need to training/educate for expanded leadership without authority issues**

- INTEGRATE WHAT MANAGERS DO AND DON'T DO INTO BASIC ORIENTATION FOR ALL EMPLOYEES.

- INTEGRATE WHAT LEADERS DO AND DON'T DO INTO BASIC TRAINING FOR ALL EMPLOYEES.

11. Need to address, revise expanded communication for breadth of leadership

IDENITFY VARIETY AND BREADTH OF ORGANIZATIONAL CHANNELS AND WHO USES WHEN AND WHY

12. Variety of leadership styles of all involved

- IDENTIFY AND INTEGRATE MANAGEMENT STYLE ASSESSMENT FOR EMPLOYEES
- IDENTIFY AND INTEGRATE LEADERSHIP STYLE ASSESSMENT FOR EMPLOYEES

13. Match of variety of management styles to leadership styles of all involved

IDENITFY PROCESSES AND ACCEPTABLE CHANGES AND TIMING FOR MANAGEMENT STYLE AS WELL AS WAYS TO INFORM EMPLOYEES OF STYLES

14. Specific organizational issues including unions, individuals doing more than one job, the daunting task of "just getting things done"

PREPARE AN ORGANIZATIONAL SWAT FOR UNIQUE ASPECTS OF MANAGEMENT VS. LEADERSHP INCLUDING ELEMENTS SUCH AS:

- HIGHED ADMINISTRATION STYLES
- UMBRELLA ORGANIZATION STYLES
- LEVEL OF IMPORTANCE (TIMELINE/DOLLARS) OF OUTCOMES
- FOLLOWER EXPECTATIONS

15. **"Generational" issues…"experience" issues of leading others**

VERBALLY ARTICUALTE SPECIFIC ISSUES OF GENERATIONAL ISSUES OF MANAGERS and FOLLOWERS IN TRAINING AND EXPECTATIONS…AS WELL AS IN ESTABLISHMENT OF BEHAVIORIAL EXPECTATIONS IN GENERAL WITHIN THE ORGANIZATION AND WITHIN WORK GROUPS

16. **The difficulty of leading those ABOVE you in the organizational or umbrella structure or related organization or community "food chain."**

VERBALLY ARTICUALTE SPECIFIC ISSUES OF LEADING "ABOVE YOU: ISSUES OF MANAGERS and FOLLOWERS IN TRAINING AND EXPECTATIONS…AS WELL AS IN ESTABLISHMENT OF BEHAVIORIAL EXPECTATIONS IN GENERAL WITHIN THE ORGANIZATION AND WITHIN WORK GROUPS…FOCUS IN ON WHAT LEADERS DO AND DON'T DO FOR THIS EXPLANATION

Resources

- ALA. Library Leadership Training Programs
  http://www.ala.org/ala/aboutala/offices/hrdr/abouthrdr/hrdrliaisoncomm/otld/leadershiptraining.cfm

- *Big Dog's Lessons in Leadership*
  http://www.nwlink.com/~donclark/leader/leader.html
  (Identified as a "complete guide" and it is very thorough)

- *Free Management Library*
  http://www.managementhelp.org/
  (Two extensive leadership categories)

- *Leadership*
  http://www.webjunction.org
  (Search for "leadership" to find MANY free resources including excellent competency lists, etc.)

- Leadership Articles
  http://www.liscareer.com/leadership.htm

- *Learning to Lead* (Florence Mason)
  http://libraryhr2009.pbworks.com/f/learning+to+lead.pdf
  (Good program analysis)

LLAMA
Middle Management Series

August 3, 1:30 pm – 3:00 pm
"Designing and Managing Team Environments"

How have you organized your library environment? What do you have in your organization besides – for example - "departments" or "branches?" Are your other work groups committees? Teams? Task forces? Within organizations, groups of people besides departments, etc. work together to achieve a wide variety of purposes including planning (the Strategic Planning Task Force), delivery of services (the Information Literacy Team or the Teaching Team), and library functions (the Collection Development Committee). These groups can be permanent or temporary/ad hoc; they have diverse memberships; and are often organized, operate and managed differently.

Organizations today are looking at their work groups and assessing their successes, the way they work, what they produce, if they are organized efficiently and thinking and possibly re-thinking about what they are "called." In looking at these groups organizations are asking themselves:

- Are these groups identified appropriately?
- Do they support the organization? Or do they get in the way of how we should run?
- Do they work within the organization's culture?
- Are they achieving what they supposed to achieve and in a timely fashion?

Today's organizations should realize it's not enough JUST TO CHANGE THE NAMES OF GROUPS. Organizations need to:
- assess not only what works and but also what doesn't work
- determine how business within groups is conducted
- ask if there are changes in organizational culture that should be considered
- identify available talent and expertise
- determine how staff might best work together to achieve
- seek contemporary communication processes
- identify timelines, styles and preferences for operating in groups

- choose best practices for carrying out group functions are best carried out

Join the second LLAMA webinar for 1.5 hours of live online content and an extensive handout for an overview of how to identify if structures provide the support need for conducting business, recommendation for how an organization might move from one structure to another and/or how to design a hybrid structure to meet an organization's diverse needs. Webinar participants- upon completion of the webinar:

- Are familiar with the variety of and specific identifying elements of groups within organizations
- Are made aware of organizational development and design resources on defining and designing work structures for diverse workgroups
- Are familiar with best practices of designing organizations to maximize the use of workgroups
- Are able to identify specific steps for designing organizational workgroups within their own organization

August 17, 1:30 pm – 3:00 pm

"Situational Leadership/Situational Management: The Infrastructure Style that Supports ALL Management Styles"

What style of management best defines your style? What leadership style best defines your leadership style? Today's administrators and managers need to be flexible in both their management and leadership styles to meet a wide variety of organizational and employee needs *and* remain flexible to handle diverse internal and external situations.

No matter the size or type of organization, different employees and different situations need to be handled in different ways. This need for the most flexible approach toward management and leadership styles is critical and the preferred style is called "situational management" or "situational leadership." These styles are the preferred approach and is based on a review of classic styles of management and leadership as it allows for maximum flexibility within an organized structure. It offers multiple, appropriate factors to be considered before the "right way" to handle a situation or manage a department or lead a group is chosen. Success of the "situational" approach requires that managers identify the style for umbrella structures, upper

level administrators, governing and advisory boards and – of course and most importantly – employees.

Situational management and situational leadership is best implemented if there is maximum employee input as well as maximum communication of styles to avoid the perception of erratic management and leadership styles. These most flexible approaches exemplify fairness and attention to employee needs and a commitment to flexible yet deliberate and consistent behavior before directions are chosen.

This LLAMA webinar provides 1.5 hours of live online content and an extensive handout that compares and contrasts existing styles of management and leadership with situational management and leadership, offers ways of integrating this style with existing styles and outlines the process for designing processes with maximum input from employees. Webinar participants- upon completion of the webinar:

- Are preferred management and leadership styles and specifically, situational management and leadership styles
- Have an extensive list of resources on situational management and leadership
- Are familiar with best practices of integrating situational management and leadership into organizational management and leadership styles
- Are able to identify specific steps for integrating styles into current organizational styles