

2012 International Year of Co-operatives



Asian Credit Union Forum September 7, 2012

Presenter: Denyse Guy, Executive Director of the Canadian Co-operative Association



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Leadership Growth and Development: Strengthening your character traits

- Key Objectives:
 - Discuss leadership styles
 - Determine own leadership style
 - Clarify competency mapping
 - Share trends: Ontario and Canada



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Who are our best leaders?



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What is leadership?

Values
Ethics
Character
Skills
Knowledge

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Why does leadership/governance matter?

- Corporate scandals, financial crisis largely due to failures in governance

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Co-op sector challenges to leadership/governance:

- Mergers/consolidation
- Aging membership, leadership
- Access to financing
- Diversity
- Using new technology

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Co-op sector challenges to leadership/governance:



- Visibility and differentiation
 - Lack of visibility in some regions, especially in urban centres
 - Lack of common branding
 - Lack of public knowledge about co-ops
 - Even within the sector, degree of co-op identity varies

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Co-op sector challenges to leadership/governance:




- Governance issues
 - Succession planning
 - Board recruitment
 - Structure/committees
 - Clarity of roles (board vs management)
 - Communications between board and members
 - Board member "burnout"

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Trends in co-op governance




Growth	Profitability	Financial stability	
Member relations	Succession planning	Risk management	HR development
Mergers	Market share retention	Communications/branding	

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According to the Guinness Book of World Records, which Beatles tune is the most covered song in history - with over 1600 recorded versions?



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Answer: Yesterday



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Hello, Goodbye...

- In the early years, each one's awareness of their own, and the other's leadership / learning style was a key ingredient of their amazingly prolific partnership.
- The emergence of an autocratic air, egos, jealousy, and most importantly, **a lack of communication**, caused their eventual split.





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Situational Leadership

- There's no "one best style"
- Depends on situation, and people you're working with
- Meetings are most effective when everyone is aware of their own preferred style, the preferred style of others in their group, and when the appropriate style is applied to a specific situation

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Leadership styles

	Bureaucratic (authoritarian)	Autocratic (impoverished)	Laissez-faire (socialite)	Democratic (team leadership)
Key characteristics	Everything must be done according to procedure or policy. Leadership according to the rules	Leader makes decisions without consulting their teams. This environment is guided by a set of rewards and punishments.	Leader does not interfere; they allow people within the team to make many of the decisions	Leaders allow the team to provide input before making a decision. Can be difficult to manage different perspectives and ideas.
When it is effective	Very particular standards, policies, and/or procedures that must be adhered to i.e. safety procedures	Serious tone needs to be set, the group lacks a distinct, confident leader Limited time to make a decision	The team is highly capable and motivated, creative project It doesn't need close monitoring or supervision	Opportunities for personal growth A large or complex problem - lots of input to solve. Encourages team building and participation.
When it is NOT effective	When a situation requires some creative problem solving or unconventional ideas	Low individual morale High turnover and absenteeism When others are expecting to give an opinion	The group is feeling insecure, lacking confidence and direction (as well as lacking set procedures)	Not enough time to get everyone's input. Necessary and more cost-effective for one, or a few, to make the decision

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Leadership scenarios

- **Take the next few minutes** to write down a list of scenarios - at home, at work, planning a trip with friends, planning a party, dealing with a traumatic event, etc. - where the following leadership styles would work best (in your opinion). Don't overthink this! Write down whatever pops into your head!

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Leadership scenarios

- **Now, take a few minutes as a group to discuss all your answers.**
- What were the common themes? Did anyone have the same answer?
- Where there any major contradictions, or opposing views as to what's appropriate at certain times? What were they?

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Questionnaire

Below is a list of statements about leadership behavior. Read each one carefully, then, using the following scale, decide the extent to which it actually applies to you. For best results, answer as truthfully as possible.


NEVER SOMETIMES ALWAYS
0 1 2 3 4 5

1. I encourage my team/co-workers/family to participate when it comes to decision making time and I try to implement their ideas and suggestions.
2. Nothing is more important than accomplishing a goal or task.
3. I closely monitor the schedule to ensure a task or project will be completed in time.
4. I enjoy coaching people on new tasks and procedures.
5. The more challenging a task is the more I enjoy it.

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Questionnaire

6. I encourage my employees/teammates to be creative about their jobs, and to think outside the box.
7. When seeing a complex task through to completion, I ensure that every detail is accounted for.
8. I find it easy to carry out several complicated tasks at the same time.
9. I enjoy reading articles, books, and journals about training, leadership, and psychology; and then putting what I have read into action.
10. When correcting mistakes, I do not worry about jeopardizing relationships.
11. I manage my time very effectively.

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Questionnaire

12. I enjoy explaining the intricacies and details of a complex task or project to my employees/co-workers/teammates/friends.
13. Breaking large projects into small manageable tasks is second nature to me.
14. Nothing is more important than building a great team.
15. I enjoy analyzing problems.
16. I honour other people's boundaries.
17. Counseling my employees/co-workers/teammates to improve their performance or behavior is second nature to me.
18. I enjoy reading articles, books, and trade journals about my profession; and then implementing new procedures I have learned.

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Scoring section

After completing the questionnaire, complete the following section:

PEOPLE	TASK
Question	Question
1. _____	2. _____
4. _____	3. _____
6. _____	5. _____
9. _____	7. _____
10. _____	8. _____
12. _____	11. _____
14. _____	13. _____
16. _____	15. _____
17. _____	18. _____
TOTAL _____	TOTAL _____
X 0.2 = _____ <small>(multiply the total by 0.2 to get your final score)</small>	X 0.2 = _____ <small>(multiply the total by 0.2 to get your final score)</small>

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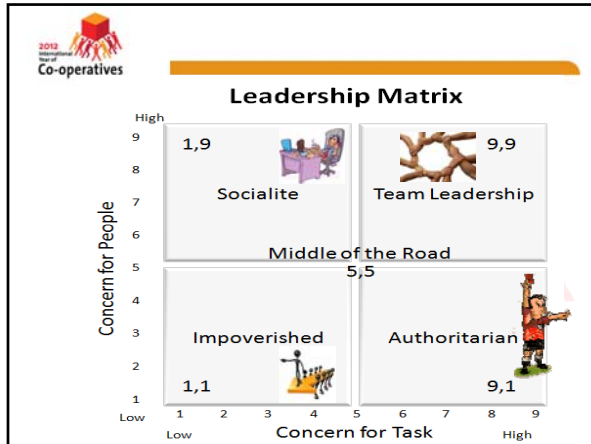
Matrix section

- Plot your final scores on your graph by drawing a horizontal line from the approximate people score (vertical axis) to the right of the matrix, and drawing a vertical line from the approximate task score on the horizontal axis to the top of the matrix. Then, draw two lines from each dot until they intersect. The area of intersection is the leadership dimension that you operate out of.
- The sample shows score of 4 in the people section and a score of 6 in the task section. The quad where the two lines intersect is the leadership style, in this case -- Authoritarian section.

Leadership Matrix

Y-axis: Concern for People (1-9, Low to High)
X-axis: Concern for Task (1-9, Low to High)

Quadrants: Socialite (1,9), Team Leadership (9,9), Impoverished (1,1), Authoritarian (9,1).
Center: Middle of the Road (5,5).
Point of Intersection: (4, 6) in Authoritarian quadrant.



The results

This chart will give you an idea of your leadership style:

- **Impoverished** (1,1 to 4,4): weak on both tasks and people skills
- **Authoritarian** (people - 1 to 4 and task - 5 to 9): strong on tasks, weak on people skills
- **Socialite** (people - 5 to 9 and task 1-4): strong on people skills, weak on tasks
- **Team Leadership** (6,6 to 9,9): strong on both tasks and people skills
- **Middle-of-the-Road** (5,5): in the middle of the chart, but with more experience and skills can display good team leadership

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Five key areas of emotional intelligence

1. **Self-awareness:** the ability to know one's emotions, strengths, weaknesses, drives, values and goals, and recognize their impact on others while using *gut feelings* to guide decisions
2. **Self-regulation:** involves controlling or redirecting one's disruptive emotions and impulses and adapting to changing circumstances
3. **Social skill:** managing relationships to move people in the desired direction
4. **Empathy:** considering other people's feelings especially when making decisions
5. **Motivation:** being driven to achieve for the sake of achievement

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Leadership roles



It is far more difficult to lead than to do!

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Thinking like a leader

Leadership and learning are indispensable to each other.... John F. Kennedy

As we look ahead into the next century, leaders will be those who empower others Bill Gates

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Phases of group development



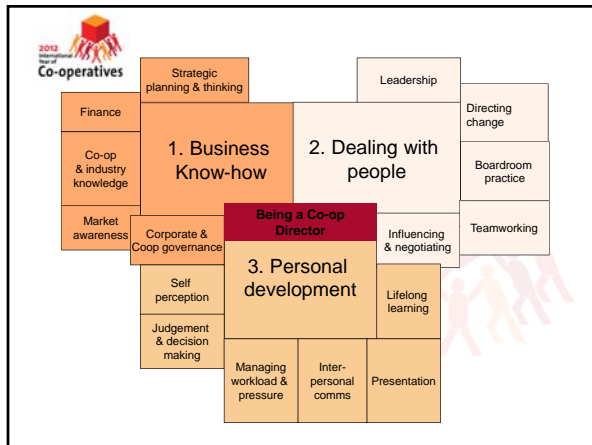
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Competency mapping



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Dealing with people and personal development



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2.1 Leadership

2.2 Directing change

2.3 Boardroom practice

2.4 Teamworking

2.5 Influencing & negotiating

2. Dealing with people

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DWP: Leadership

- Create an effective working environment.
- Have a natural authority.
- Lead from the front or from within.
- Champion of the business vision and strategy.
- Follow values and the co-operative principles.

What is your leadership style?

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DWP: Directing Change

- Participate in deciding direction, then whether your idea is adopted or not, champion the change and help others to accept it, sells the benefits.

What have you done as a member or director to do this?

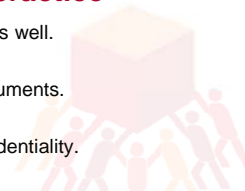

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DWP: Boardroom practice

- Be able to manage meetings well.
- Good presentation skills.
- Able to make reasoned arguments.
- Able to build consensus.
- Ensure discretion and confidentiality.

What do you do after a board meeting?



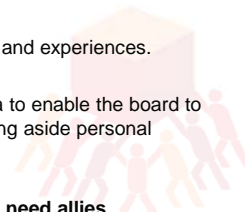

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DWP: Teamworking

- Flexible in adopting roles.
- Apply complementary skills and experiences.
- Provide practical support.
- Subjugate your own agenda to enable the board to do business (including putting aside personal differences).

Even mavericks need allies.

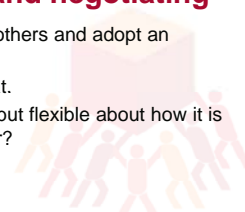



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DWP: Influencing and negotiating

- Able to identify the style of others and adopt an appropriate approach.
- Strongly reasoned argument.
- Determined about the goal but flexible about how it is reached. Or do you roll over?



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3. Personal development

- 3.1 Self awareness
- 3.2 Judgement & decision making
- 3.3 Managing workload & pressure
- 3.4 Inter-personal comms
- 3.5 Presentation
- 3.6 Lifelong learning

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PD: Self awareness

- Strong personal impact, assertive and self-confident.
- Conscientious, purposeful and enthusiastic.
- Prepared to change and adapt behaviours to create more effective results.
- Look for a mentor or to mentor others.
- Humility.

You were ELECTED to serve others.

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PD: Judgement & decision-making

- The ability to objectively analyse situations, integrating information from a variety of sources, seeing connections and establishing relationships.
- To apply insight and balance to understand the various factors influencing each decision.
- Think through the implications of various courses of action.
- The capacity to balance prudence with risk-taking.
- Be able to demonstrate due diligence

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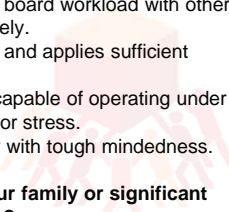
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PD: Managing workload and pressure

- Keeps in control, prioritising the board workload with other commitments and plans effectively.
- Manages a balance of activities and applies sufficient energy and action.
- Having a stable temperament, capable of operating under varying conditions of constraint or stress.
- The ability to balance sensitivity with tough mindedness.

Do you have the buy in of your family or significant others?



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PD: Interpersonal skills

- The ability to relate to and understand the feelings, motives and behaviour of others.
- The ability to communicate, to be a good listener and recognise the need for effective interpersonal communications.
- The ability to resolve conflicts..
- Having a sense of humour.



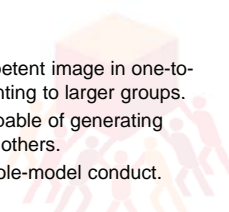
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PD: Presentation

- Looking and acting the part.
- Presenting an effective, competent image in one-to-one situations or when presenting to larger groups.
- Having a positive attitude, capable of generating enthusiasm and conviction in others.
- Demonstrating integrity and role-model conduct.




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PD: Lifelong learning

- Desire to continually learn more about your role as a director/staff/member/volunteer and the co-op.
- Lead by example.
- Champion training and development.
- Assess your skills and knowledge and the gaps.



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Conversations

- Now, take a few minutes as a group to discuss your thoughts about these core competencies.
- How is your credit union supporting competency development among volunteers, staff, Board of Directors and President?



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Core competencies

1. Audit and Compliance Oversight
2. Board and CEO Performance
3. Credit Union Operations
4. Financial Literacy
5. Governance and Ethics
6. Leadership
7. Regulatory Environment
8. Risk Management Oversight
9. Strategic Planning




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Current practices from the largest credit unions in Canada



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Tool box: PART 1

ORGANIZATIONAL STRUCTURE

- Vision, mission, values
- Learning organization
- By-laws and policies: human rights, conflict of interest, code of conduct, purchasing
- Job descriptions and Terms of Reference: staff, board, committees, etc.
- Team building focusing on communication and accountability



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Tool box: PART 2

STRATEGIC PLANNING PROCESS

- Future focused→ key strategic directions
- Balanced scorecard
- Continuous evaluations of meetings, committees, CEO and Board of Directors, etc.
- Succession planning
- Celebration



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Moving forward



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