



July 2021

Leadership Institute

Session 1

Leading Strategically

# Leadership Institute Cohorts

## New approach to leadership development

- Facilitate smoother transitions in committee leadership
- Enable lagging committees to reengage
- Provide a platform through which committee chairs/vice chairs can interact more directly

## Topics

- TOPIC 1: Roles & Responsibilities: Connecting to APS Strategic Plan, delegation as chair, leading, managing, identifying/mentoring next leaders
- TOPIC 2: Leading, Managing, Partnering, Engaging
- TOPIC 3: Tools & Techniques to lead committees (what we've learned so far)
- TOPIC 4: Building an authentically diverse and inclusive culture

## Online Series

- TOPIC 1: July 15, 20, and 21
- TOPIC 2: October 13-15
- TOPIC 3: January 10-12, 2022
- TOPIC 4: April 2022 TBD

# Today's Session

- What is leadership and what informs my sense of leadership
- The unique context of a Professional Society
- Roles within the organization
- Connecting to the APS Strategic Direction

# Six Competencies Exemplary Leaders Share

- Warren Bennis



Create a sense of common purpose - vision



Engage and Motivate Others



Build an adaptive and agile social structure



Generate and sustain trust (culture of candor)



Develop Leaders



Get results / outcomes

“Perhaps the only unperishable characteristic at the base of all effective leadership is character. It is the human connection between the leaders, the led, and the organization.”

# Leading - 4 Dimensions



## Leading Strategically

### Competencies

- External awareness
- Strategic thinking
- Vision
- Decisiveness
- Entrepreneurship
- Problem-solving



## Leading People

### Competencies

- Conflict management
- Diversity
- Integrity
- Accountability
- Credibility
- High-level communication
- Developing others
- Team building



## Leading Change

### Competencies

- Creativity
- Innovation
- Flexibility
- Resilience
- Initiative
- Self confidence
- Prudent risk-taking



## Leading Collaboratively

### Competencies

- Building coalitions
- Political savvy
- Influencing/negotiating
- Fostering relationships

# Your Model of Leadership Behavior?

- Where does your **mental model** for being **a leader** come from? (such as experience with another association, corporate, community organization, service organizations, academic institution, etc.)
- Where might there be major **differences** between the source(s) of your **mental model** and other organizations?
- What are the implications of those differences for your leadership?

# Self Assessment – Fundamental Competencies

These competencies are the foundation for success and considered essential for good leaders.

Check one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Excellent Interpersonal Skills</b>				
1. I treat others with courtesy, sensitivity and respect.				
2. I consider and respond appropriately to the needs and feelings of different people in different situations.				
3. I value that each person is different.				
<b>Good Communication Skills</b>				
4. I write in a clear, concise, organized and convincing manner for the intended audience.				
5. I make clear and convincing oral presentations.				
6. I listen effectively; asking for clarification as needed.				
7. I am aware of how appearance and body language affect effective communication.				

# Self Assessment – Fundamental Competencies

These competencies are the foundation for success and considered essential for good leaders.

Check one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>High Ethics</b>				
8. I behave in a fair, honest and ethical manner.				
9. I show consistency between my words and actions.				
10. I model high standards to ethics.				
<b>Dedication to Lifelong Learning</b>				
11. I am aware and recognize my own strengths and weaknesses.				
12. I pursue self-development.				
<b>Committed to Fostering Leadership in Others</b>				
13. I provide opportunities for others to be leaders.				
14. I am willing to act as a mentor to others.				
15. I help others develop their leadership skills.				



# Identifying your Next Leader

- Recognize the qualities a person possesses that allow them to step into the role. *Not step-up but step-in.*
- Observe who:
  - Understands our common sense of purpose or vision?
  - Engages and motivates others
  - Understands and Reinforces an adaptive and agile structure?
  - Gains the trust of others through self-awareness and candor?
  - Positions others to lead when appropriate?
  - Gets results?



# Successful Leadership in Contemporary Organizations



# An association/society is

a group of people who **voluntarily** come together to solve **common** problems, meet **common** needs, and accomplish **common** goals.



# Our Society's DNA



**Associations/Societies are unique because the same populations are:**

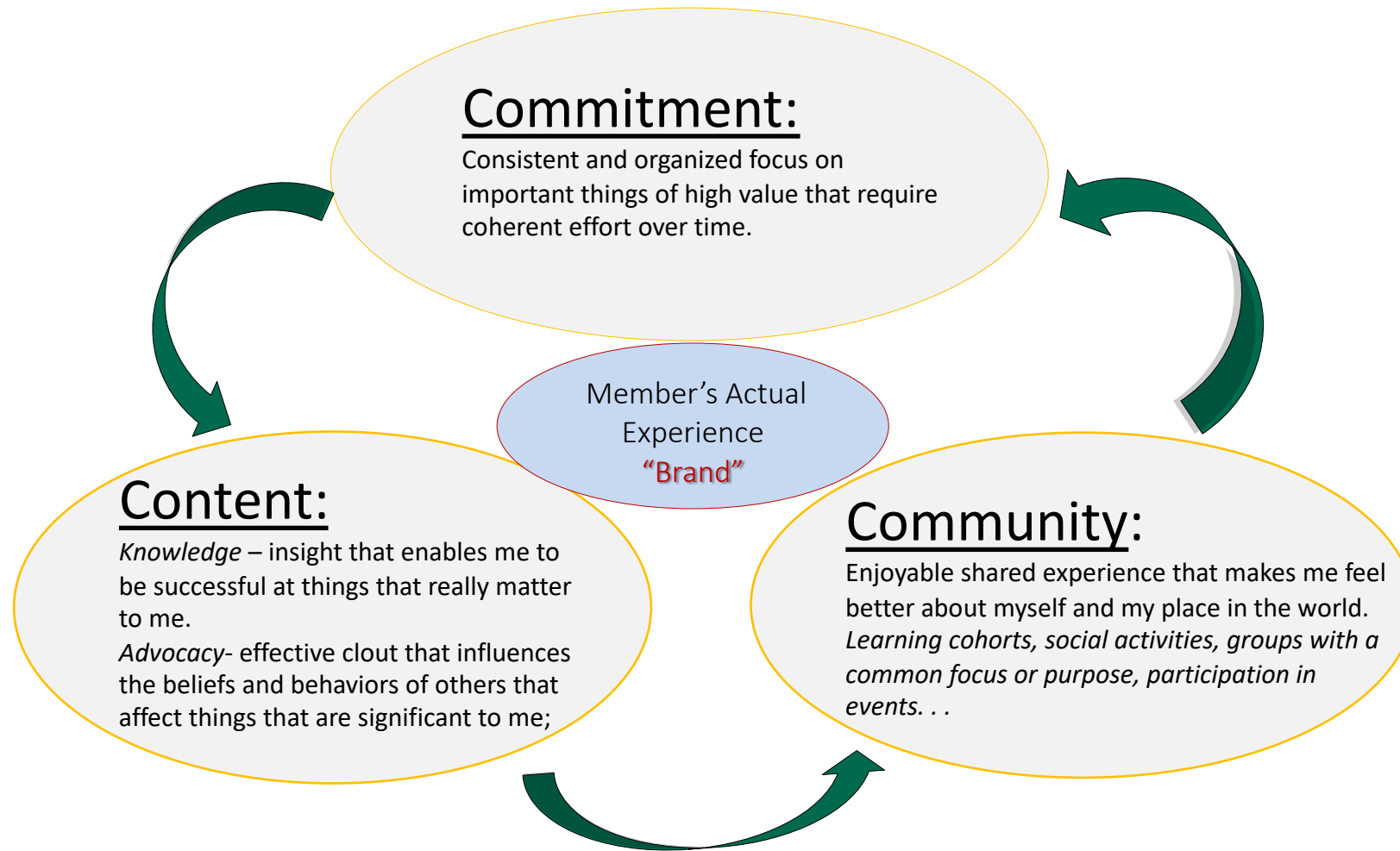
- the **owners**,
- the **customers**, and
- the **workforce** of the organization.

# Associations' key competitive advantages:

- the aggregate intellectual capital of their membership
- their energy as communities with common purpose
- their credibility as voluntary institutions
- their ability to have impact for an entire profession or industry

- *The Will to Govern Well, Tecker, Frankel, Meyer, Foundation of the ASAE*

# The Distinguishing Value Proposition of the 21st Century Association



# Discussion

- How does your committee add value to the APS member's experience?

# Council Responsibilities



1. Set organization's **direction**
2. Ensure necessary **resources**
3. Provide **oversight**



# SUCCESSFUL STRATEGIC PLANNING



INCLUSIVE



FORWARD-LOOKING



RESPONSIVE



CONTINUOUS

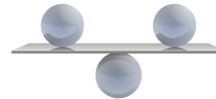
# SUCCESSFUL STRATEGIC PLANS



BOLD



A STRETCH



BALANCED



FOCUSED



MEASURABLE

# Council Responsibilities

1. Set organization direction
2. Ensure necessary resources
3. Provide oversight



# Staff Responsibilities

1. Develop Strategies, options, timelines and assessment of resources necessary to achieve goals
2. Partner with volunteers
3. Implement

# Staff Responsibilities

## 2. Partner with volunteers

- Committee / Task Force
- Members bring needs / content expertise
- Staff brings process expertise



# Types of Partnerships in Voluntary Organizations

- Board / Staff
- Board / Committees
- Committee/Committee
- Committee / Staff
- Staff / Staff
- Our Organization / Other Organization



# Role of Committees in Voluntary Organizations

- **Thought Force** – a group with unique knowledge, experience, and/or perspective brought together to make recommendations on strategic directions or new policies, products or services.
- **Work Force** – a group with unique knowledge, experience, and/or perspective brought together to deliver a specific product or service that is aligned with the strategic goals of the organization.



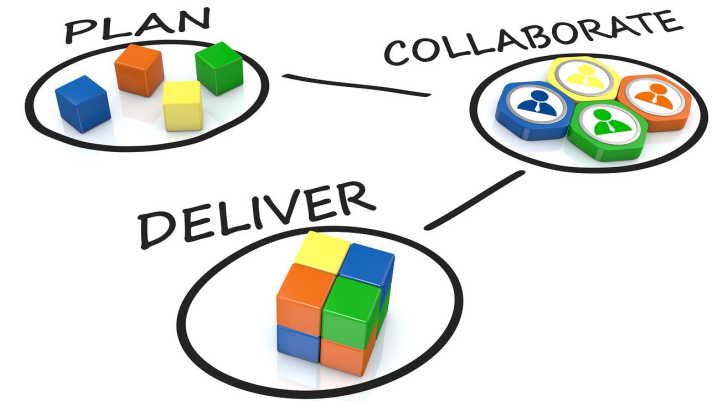


# APS Committees

- Focus for leadership in subject matter and policy
- Crucial role in keeping APS a vibrant organization, connected to its grassroots
- Help APS members achieve their goals

# Characteristics of Effective Teams

- Unity of Purpose
- Process Clarity
- Role Clarity
  - Leadership shifts depending upon needs
- Open and honest participation (culture)
  - Communication
  - Listening
  - Problem solving
  - Decision-making



# What Will Earn Engagement From Volunteers?

- Working on the things that matter to them.
- Demonstrating the work is making a positive difference.
- Providing an enjoyable opportunity for involvement.





# Connecting



# to



## APS Vision

The American Phytopathological Society is a diverse, global community of scientists that:

- provides credible and beneficial information related to plant health;
- advocates and participates in the exchange of knowledge with the public, policy makers, and the larger scientific community;
- promotes and provides opportunities for scientific communication, career preparation, and professional development for its members.

# Current APS Strategic Priorities



Secure the future of APS as a leading source of plant health knowledge dissemination.



Strengthen APS as a global professional organization for plant health science.



Foster innovative conference strategies to meet members needs and expectations for knowledge exchange and networking.

# 2021 Council Key Focus Areas

## **Growth & Innovation: Progress toward strategic priorities**

- Enhance member experience
- Continual flow of relevant information



# Discussions with your Committee

Between now and our next gathering in October

- What is our specific charge (task we are asked to accomplish on behalf of APS)?
- Which goal are we helping to achieve?
- Who are the key stakeholders impacted by our work?
- What do we anticipate will be different for them when we are successful?  
Or
- What outcomes are we committed to accomplishing on their behalf?
- What are the necessary steps we must take to deliver that success and when? How will we make that happen?

# Discussion

- How is your committee connected to the APS strategic Direction?

# Discussions with your Committee

Between now and our next gathering in October

- What is our specific charge (task we are asked to accomplish on behalf of APS)?
- Which goal are we helping to achieve?
- Who are the key stakeholders impacted by our work?
- What do we anticipate will be different for them when we are successful?  
Or
- What outcomes are we committed to accomplishing on their behalf?
- What are the necessary steps we must take to deliver that success and when? How will we make that happen?

# Identifying your Next Leader

- Recognize the qualities a person possesses that allow them to step into the role. *Not step-up but step-in.*
- Observe who:
  - Understands our common sense of purpose or vision?
  - Engages and motivates others
  - Understands and Reinforces an adaptive and agile structure?
  - Gains the trust of others through self-awareness and candor?
  - Positions others to lead when appropriate?
  - Gets results?



# Questions

Additional questions, comments or ideas?

**Jim Meffert**

**612-817-8953**

[jmeffert@tecker.com](mailto:jmeffert@tecker.com)



# Self Assessment – Leading Strategically

Involves the ability to meet organizational and personal goals and expectations. Inherent in this theme is the ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems and calculating risks.

Check one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>External Awareness</b>				
1. Understands the complexities of communities (education, economics, people government, etc.)				
2. Understands the role of government and public policy making.				
3. Understands who the decision makers are and how public decisions are made.				
4. Understands social injustice, prejudices and biases in our society and work to eliminate them.				
5. Understands interdependence of people and the impact of relationship on results.				
<b>Problem Solving</b>				
6. Takes initiative for successful resolution of conflict with others.				
7. Can manage conflict to create positive opportunities.				
8. Able to give constructive negative feedback to others when needed.				

# Self Assessment – Leading Strategically

Involves the ability to meet organizational and personal goals and expectations. Inherent in this theme is the ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems and calculating risks.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Strategic Thinking and Vision</b>				
9. Formulates objectives and priorities.				
10. Implements plans consistent with long term interests of the organization.				
11. Capitalizes on opportunities.				
12. Identifies problems and weighs relevance and accuracy of information.				
13. Acts as a catalyst for change.				
14. Makes well informed and timely decisions, even when data are limited.				
15. Builds a shared vision with others.				

# Self Assessment – Leading People

Involving the ability to lead people toward meeting the organization’s vision, mission, and goals. Focuses on providing an inclusive workplace that fosters the development of others, facilitates cooperation and teamwork, and supports constructive conflict resolution.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Accountability</b>				
1. I work to solve problems and not blame others when we hit a stone wall.				
<b>2. I am able to give constructive negative feedback to others when needed.</b>				
3. I initiate successful resolution of conflict with others.				
4. I follow through on commitments I make.				
<b>Diversity</b>				
<b>5. I value that each person is different.</b>				
6. I treat each person with respect.				
7. I work effectively with others who are different from me.				
8. I reach out to include people.				
<b>9. I understand the ethical responsibilities that come with leadership.</b>				

# Self Assessment – Leading People

Involving the ability to lead people toward meeting the organization's vision, mission, and goals. Focuses on providing an inclusive workplace that fosters the development of others, facilitates cooperation and teamwork, and supports constructive conflict resolution.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Credibility</b>				
10. I follow through on commitments I make.				
11. I am trustworthy.				
12. I act in accordance with my words, e.g. "walk the talk."				
<b>13. I adapt my leadership style to different situations.</b>				
<b>14. I listen carefully to understand what another person is saying.</b>				
15. I seek feedback from others, even if it may be negative.				

# Self Assessment – Leading Change

Involves the ability to bring about strategic change, both within and outside the organization, to meet personal organizational goals. Inherent in this theme is the ability to establish (or participate in establishing) an organization's or personal vision and to implement it in a continuously changing environment.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Self Confidence</b>				
1. I am able to exert self-discipline and control over my behavior.				
2. I am aware of my attitudes, values, biases and prejudices.				
3. I clearly communicate true feelings with compassion and forthrightness.				
4. I am able to directly ask for what is needed.				
5. I am forward looking and spend the majority of my time on external future issues.				
<b>Risk Taking</b>				
6. I look beyond obstacles to see possibility.				
7. I am willing to risk success and support others taking risk.				
8. I view mistakes as a healthy outcome of risk taking.				

# Self Assessment – Leading Change

Involves the ability to bring about strategic change, both within and outside the organization, to meet personal organizational goals. Inherent in this theme is the ability to establish (or participate in establishing) an organization's or personal vision and to implement it in a continuously changing environment.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Resilience</b>				
9. I am open to change, able to learn from mistakes and move on.				
10. I seek and support new models and ways of doing things.				
11. I deal effectively with pressure.				
12. I remain optimistic and persistent, even under adversity.				
13. I recover quickly from setbacks.				
14. I am oriented toward a “can do” approach and relies on experience and intuition.				
15. I do not rely solely on “expert” opinion or permission to proceed.				

# Self Assessment – Leading Collaboratively

Involves the ability to work with others to manage human, financial and information resources strategically and collaboratively in order to achieve organizational goals. Includes the ability to build and sustain a network of people to attain personal and business success.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Building Coalitions</b>				
1. I help a group identify a common goal.				
2. When working in a team situation, I help the group keep its focus.				
3. When I'm responsible for a task or project, I follow through in a timely manner.				
4. I work well with others on a team.				
5. I understand group dynamics and adjust my leadership style accordingly.				
6. I help groups make decisions through consensus.				
7. I understand the importance of building partnerships.				
8. I give recognition to people who have done the work.				

# Self Assessment – Leading Collaboratively

Involves the ability to work with others to manage human, financial and information resources strategically and collaboratively in order to achieve organizational goals. Includes the ability to build and sustain a network of people to attain personal and business success.

Check one one of the first three and then go back and select skills you want to develop.	Do not do well	Do somewhat well	Do well	Want to develop
<b>Influencing/Fostering Cooperation</b>				
9. I try to make a difference for causes greater than my own need.				
10. I volunteer to serve others in the community.				
11. I help people in a community organize to undertake a worthwhile project.				
12. I understand the role of non-profits in a community.				
13. I help people who do not have a voice.				
14. I help groups find resources to implement their plan of action.				
15. I help people to think well of themselves.				