



Leadership & Management: Making the switch from Player to Coach

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 - Director, Strategical Alliances & Donor Engagement
 - Director, Leadership Giving
 - Director, Marketing
 - Senior Manager, Fundraising Events
 - Manager, MS Walk

Making the switch from Player to Coach

- ▶ Growing both your leadership abilities and management skills is critical for your success.
- ▶ Many excellent fundraisers come into management roles without any formal training in either leadership or management...and often aren't sure how best to grow these skills.
- ▶ In this session we'll discuss the differences between 'leading' and 'managing', and share practical tools and approaches to help you grow these skills.

Who's in the room, and why?

- ▶ Who are you, and why are you here?
- ▶ Your learning goals for today?
- ▶ Any burning questions?

What's the Difference?

Leadership vs Management

...according to experts

- ▶ “The conventional definition of management is getting work done through people, but real management is developing people through work.” ~ *Agha Hasan Abedi*
- ▶ “Management is doing things right; leadership is doing the right things.” ~ *Peter Drucker*
- ▶ “Management is, above all, a practice where art, science, and craft meet.” ~ *Henry Mitzberg*

The Key Differences Between Leading and Managing

John Kotter

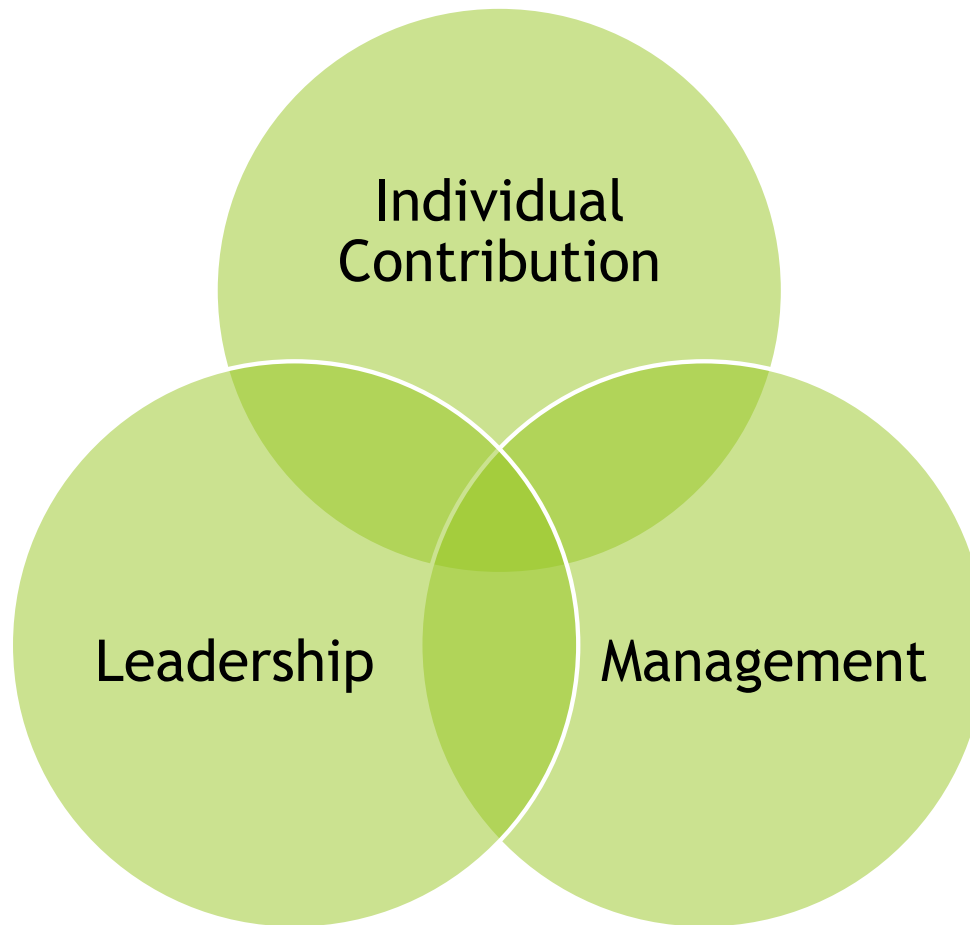
The Key Differences
between Leading and
Managing

The Difference Between Leadership and Management

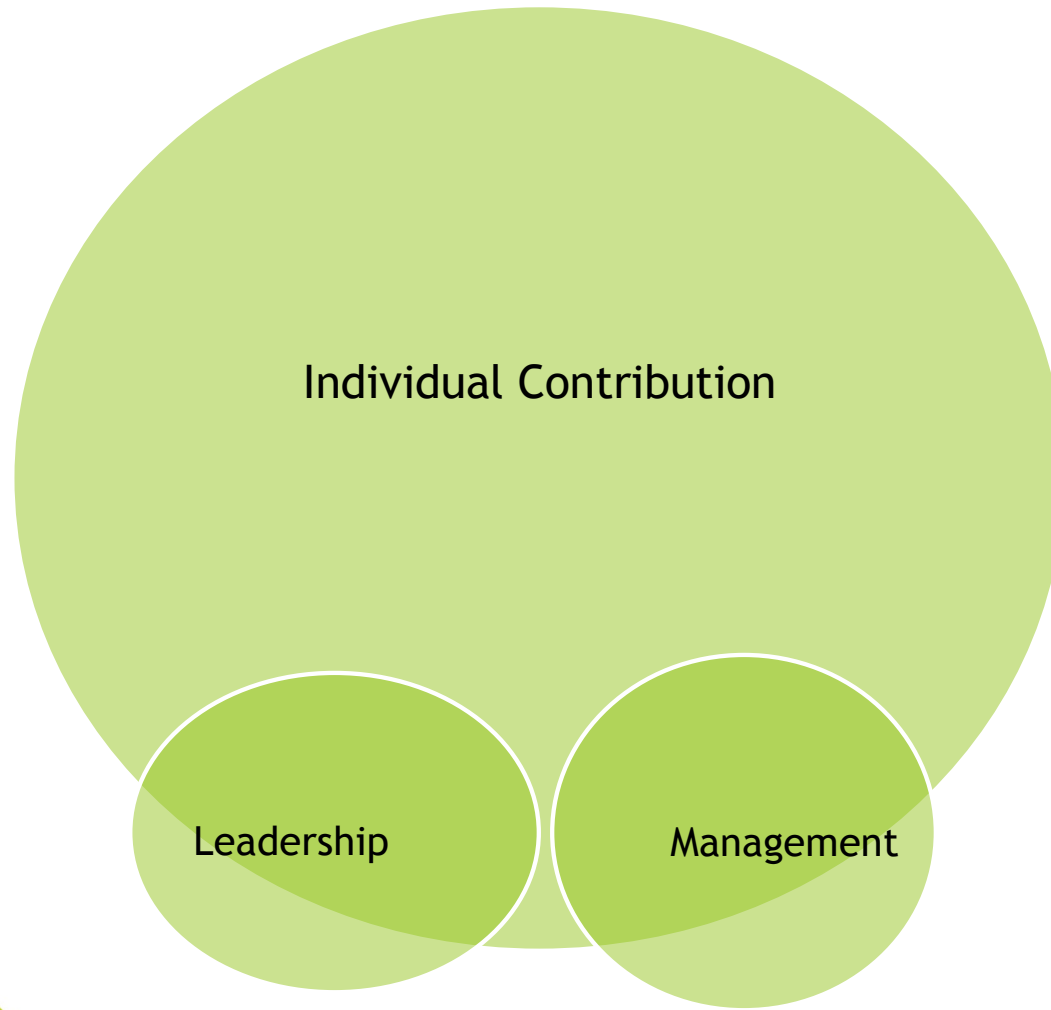
| | Leadership is About ... Coping With Change | Management is About ... Coping With Complexity |
|--------------------------------|--|--|
| What are we setting out to do? | <p>➤ Establishing Direction Developing a vision and strategies to achieve that vision; setting high but reasonable standards.</p> | <p>➤ Planning and Budgeting Establishing detailed steps and timetables and allocating resources.</p> |
| How do we deliver results? | <p>➤ Aligning People Communicating direction to influence creation of teams and coalitions that understand vision and strategy.</p> | <p>➤ Organizing and Staffing Establishing a structure to achieve the plan; delegating authority and providing policies and processes.</p> |
| How do we make it happen? | <p>➤ Motivating, Mentoring, Inspiring Energizing people to develop and overcome barriers to change.</p> | <p>➤ Controlling and Problem Solving Monitoring and organizing.</p> |
| What are the outcomes? | <p>➤ Producing Change Often to a dramatic degree, such as cultivating new services and new approaches.</p> | <p>➤ Producing Predictability and Order Consistently achieving budgets and targets.</p> |

Source: Based on materials in John Kotter's "What Leaders Really Do," *Harvard Business Review*, December

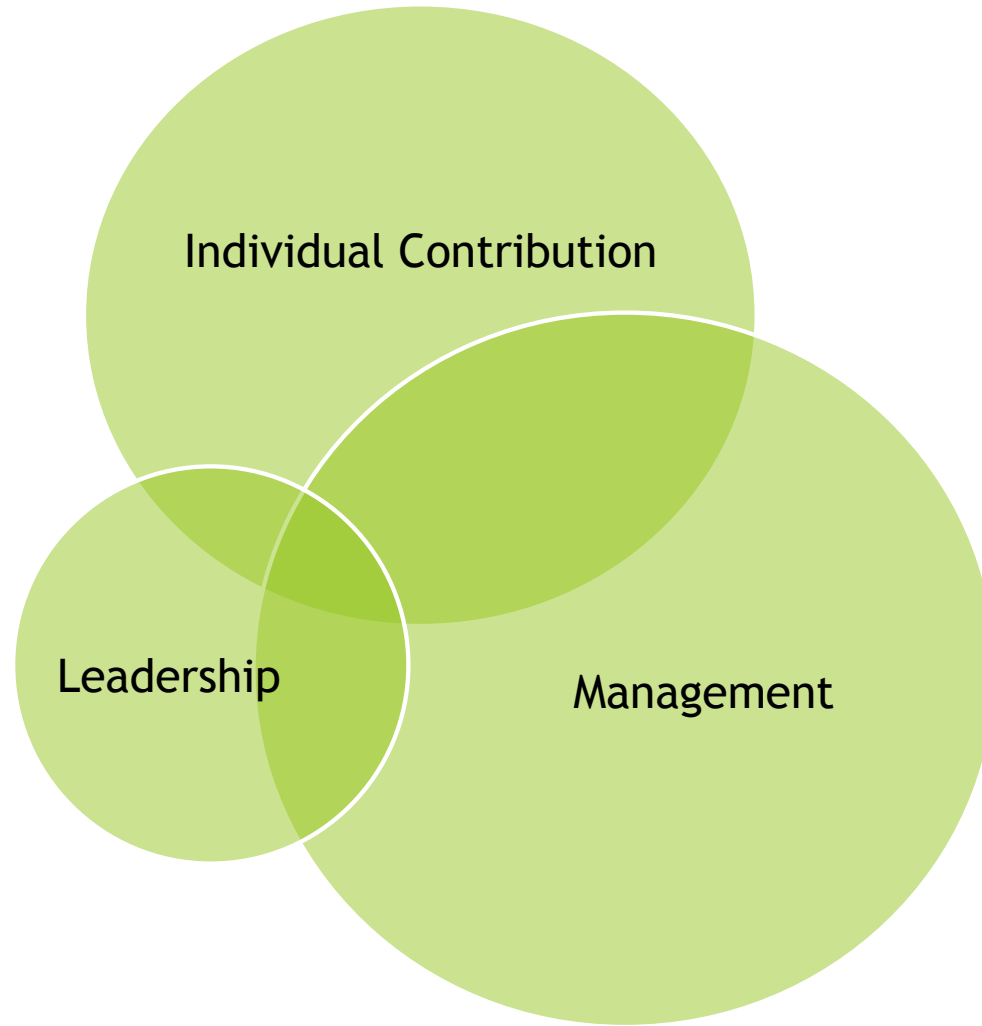
Distinct but overlapping responsibilities



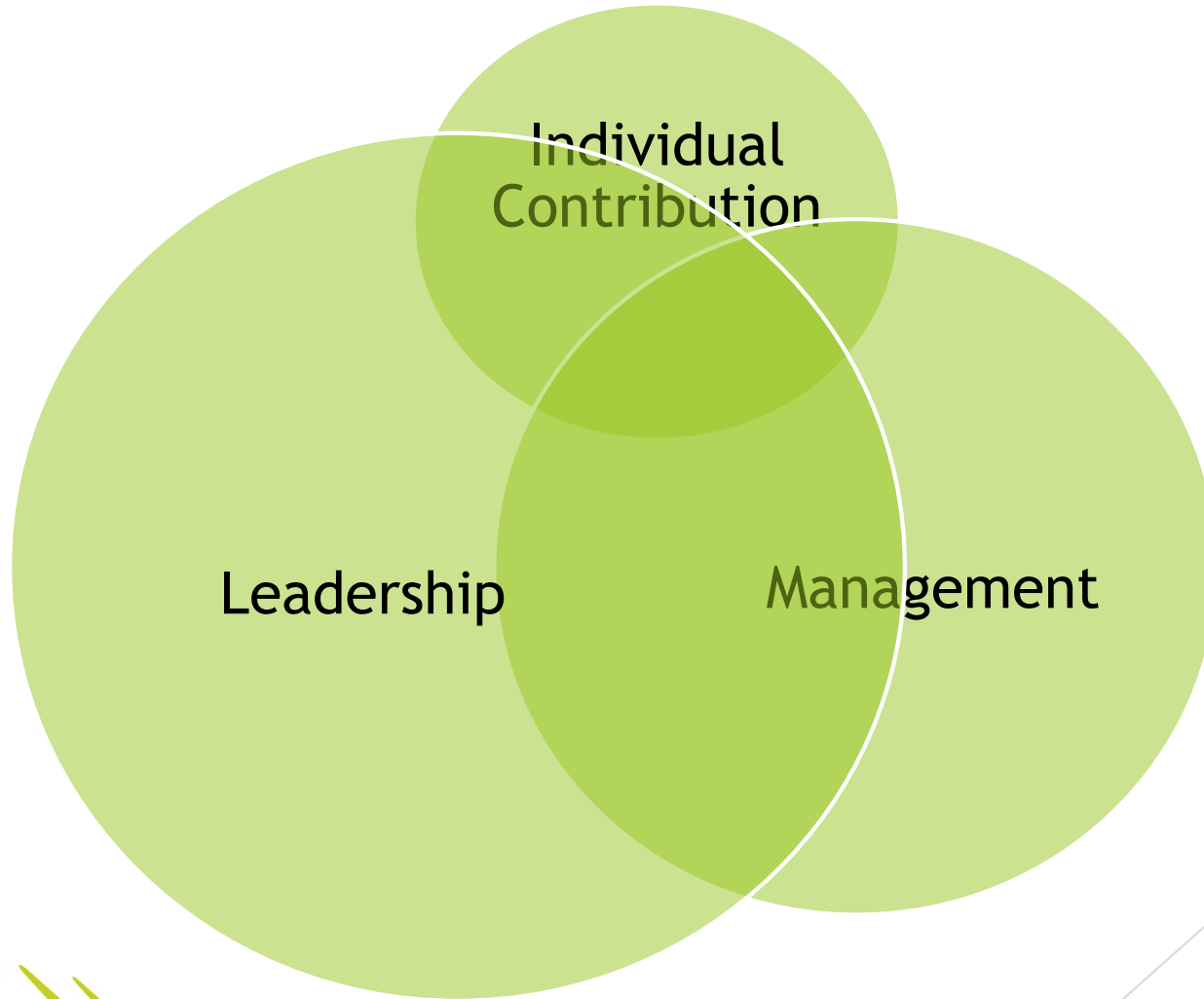
A major gifts officer...



A typical mid-level fundraising manager...



The average CEO...





Let's Explore Management

What is Management?

Set of behaviours which ensure the right things get done

According to Wikipedia...

- ▶ Management in all business and organizational activities is the act of getting people together to accomplish desired goals and objectives using available resources efficiently and effectively.
- ▶ Management comprises: planning, organizing, staffing, leading or directing, and controlling an organization or effort for the purpose of accomplishing a goal.
- ▶ Since organizations can be viewed as systems, management can also be defined as human action, including design, to facilitate the production of useful outcomes from a system.
 - ▶ *This view opens the opportunity to 'manage' oneself, a pre-requisite to attempting to manage others.*

Management Competencies

| Competency | Examples of Subjects / Courses |
|--|--|
| Planning | Strategic Planning Operational Planning |
| Budgeting | Finance & Budget management |
| Organizing | Organizational Behaviour & Design Project Management Infrastructure management (IT, facilities, etc.) Business Communication |
| People Management (<i>self, staff, peers, boss, volunteers</i>) | Human Resources Compensation HR Law & Hiring Training & Coaching Delegation & Supervision Giving & taking feedback Performance Management Managing in a unionized environment |
| Controlling | Reporting & Results Analysis Performance monitoring |
| Problem Solving | Change management Issues/Crisis management Data driven decision making |

How do people learn to be Managers?

Combination of knowledge + practical experience

Where can you access Management training?

- ▶ University courses (continuing ed or degree)
 - ▶ Overall management programs
 - ▶ Courses in specific management competency areas
- ▶ College programs (ditto)
- ▶ Workshops through community groups or professional organizations
- ▶ Books, articles, magazines, blogs, pod casts
 - ▶ Any favourites?
- ▶ Other ideas?

Designing your Personal Management Growth Plan

- ▶ In which of the core management competencies do you have a strong knowledge base?
- ▶ In which do you have strong practical experience?
- ▶ In which areas do you have ‘gaps’ in knowledge or experience?
- ▶ How do you best learn? (consider for each area)
- ▶ Where can you look for info or learning opps?
- ▶ How can you gain practical experience?

Personal Management Growth Plan

| Competency | Examples of Subjects / Courses | Rank your knowledge (1-5, 5=expert) | Rank your skill (1-5, 5=expert) | SUM / Gap | Learning priority | Timeline | Best Learning Method | Learning location |
|-------------------------------------|---------------------------------|-------------------------------------|---------------------------------|-----------|-------------------|----------|----------------------|-------------------|
| Planning | Strategic Planning | | | | | | | |
| | Operational Planning | | | | | | | |
| Budgeting | Finance | | | | | | | |
| | Budget management | | | | | | | |
| Organizing | Financial Accounting | | | | | | | |
| | Organizational Behaviour | | | | | | | |
| | Project Management | | | | | | | |
| | IT management | | | | | | | |
| | Facility Management | | | | | | | |
| People Management | Program Management | | | | | | | |
| | Business Communication | | | | | | | |
| | Human Resources | | | | | | | |
| | HR Law | | | | | | | |
| | Hiring & interviewing | | | | | | | |
| | Employee Engagement & Retention | | | | | | | |
| | Compensation | | | | | | | |
| | Giving & taking feedback | | | | | | | |
| | Training & Coaching | | | | | | | |
| | Performance Management | | | | | | | |
| | Delegation & Supervision | | | | | | | |
| | Managing Up to your Boss | | | | | | | |
| | Volunteer Management | | | | | | | |
| Nonprofit Board Governance | | | | | | | | |
| Managing in a unionized environment | | | | | | | | |
| Controlling | Financial reporting | | | | | | | |
| | Impact reporting | | | | | | | |
| | Analysis | | | | | | | |
| Problem Solving | Performance monitoring | | | | | | | |
| | Data driven decision making | | | | | | | |
| | Change management | | | | | | | |
| | Issues/Crisis management | | | | | | | |

How will you gain practical Management experience?

- ▶ Volunteering to serve on or lead a project
- ▶ Asking your manager to help you learn
- ▶ Taking on a temporary growth opportunity
 - ▶ Temporary parental leave contract
 - ▶ Take on part of someone's duties for a period of time
- ▶ Taking a lateral move into a different area
- ▶ Set up an internal exchange / buddy up in your org
- ▶ Volunteering for a charitable organization
- ▶ Other ideas?

Mentors & Role Models

- ▶ What kind of manager do you want to be?
- ▶ Look at management role models from your past or current positions
- ▶ Who are your 'go to' people when you get in sticky situations?
- ▶ How do you identify and find mentors?
- ▶ Formal vs Informal mentors
- ▶ Modelling behaviour for others

Food for thought:

Common Management Mistakes

1. Not transitioning from worker to manager, from friend to boss
2. Lack of clear goals and expectations...for yourself and for others
3. Failing to delegate...
4. Failing to follow up when you do delegate
5. Failing to communicate...with your boss, with your team
6. Not making time for employees
7. Not recognizing employee success...or taking credit for it
8. Failing to learn from your mistakes...or theirs, which are actually yours, since they work for you...
9. Resisting change...there is more than one 'right' idea
10. Going for the quick fix over the lasting solution
11. Failing to understand that your 'first team' is the organization
12. Not seeing your peers as your support team and partners...it is not a competition between departments

Developing Leadership

Imagine
Leadership

Leadership Competencies

| Competency | Examples of abilities |
|--|---|
| Establishing Direction | Vision Laying out strategies Articulating ambitious goals |
| Aligning People | Communicating vision Instilling trust Influencing creation of teams & coalitions |
| Motivating, Mentoring, Inspiring | Fanning the flames of passion and creativity Energizing people to overcome barriers Celebrating success Leading by example Leading with Emotional & Social Intelligence |
| Producing change | Cultivating new ideas, services, and approaches Taking calculated risks Learning from failures |

IQ...EQ...SI.

IQ

- Intellect
- 'Threshold' capability for executives
- Cannot be learned
- Can be reinforced

EQ

- Personal capabilities or competencies
- Typifies outstanding leaders
- Can be learned
- Not nice to have... but need to have

SI

- Your success depends on others being successful
- Listening & paying attention to what's said
- Rapport, empathy, & skilled interaction with others

Can leadership be learned?

(and if so, how?)

Crucial Competence: Emotional and Social Intelligence in Leadership

CRUCIAL COMPETENCE

Building Emotional & Social Leadership

Goleman, Boyatzis, Davidson, Druskat, and Kohlrieser



Leadership Myths

- ▶ Leaders are born, not made
- ▶ True leaders are charismatic extroverts
- ▶ Leadership depends on your position/title
- ▶ Leaders are always “on”
- ▶ Leadership is about being liked
- ▶ Leadership is a scheduled event
- ▶ Others....?

Demonstrating Leadership regardless of your position

- ▶ Deliver superior performance, consistently
- ▶ Display a positive attitude, always
- ▶ Be an exceptional team player and ‘follower’
- ▶ Volunteer to lead projects and join initiatives
- ▶ Become a well-rounded generalist
- ▶ Own your failures/mistakes...and learn from them
- ▶ Think strategically, and see the big picture at every turn
- ▶ Watch others, assess, listen, learn
- ▶ Be incredibly self aware

Designing your Personal Leadership Growth Plan

- ▶ How can you show leadership in your current role and position in the organization?
- ▶ Assess your emotional and social intelligence
 - ▶ In which areas are you stronger? Weaker?
- ▶ Consider working with a leadership coach when you take on a big leadership role, or when you are struggling
- ▶ Consider your communication style and skills
 - ▶ Consider Toastmasters or other development

Your Career is a Journey

Finding professional purpose is part of your journey through life



Worth thinking about.

- ▶ How we see ourselves is not always how others see us...and in the workplace their views matter more
- ▶ Be brutally honest with yourself about what you're great at, and what you need to work on
- ▶ Temper your ambition with patience
 - ▶ If your supervisor doesn't think you're ready, but you do...that is a good time to ask WHY, and listen carefully to the answer
- ▶ Take responsibility for your own growth & learning
 - ▶ Our employers are our partners in this journey, because it's in their best interests...but....
 - ▶ If your employer cannot or will not invest in you, then invest in yourself!

Questions?

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