

# Leadership Through Turbulent Times

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# Today's Goals

- Guiding Thoughts
- Mission, Culture and Values
- Case Studies
- Developing Your Own Leadership Style



**Our Boards and Heads Need Us to be  
Strategic Partners by Leading Effectively  
in ALL Circumstances**



# Guiding Thoughts...

As we explore each case:

- Names, certain circumstances, etc. have been changed to protect the guilty and innocent ;)
- No “wrong” answers...consider each case relative to your organization’s mission, culture and values...what would you do? Why?
- Share your wisdom with the group. It will help each of us develop our unique leadership style.

# Mission

- Reason for Existing
- Communicates the essence of your organization: who you serve and why
- Identifies what makes you unique
- INEXTRICABLY linked with VISION and VALUES



# Values

“Values reflect what the leader holds worthy, what the organization assigns worth. They are the ideals, principles, and philosophy at the center of the enterprise. They are protected and revered. They reveal the company’s heart and soul. They energize the covenant.”

~Leonard L. Berry



# Culture

“The values and behaviors that contribute to the unique social and psychological environment of an organization.

Organizational culture includes an organization's expectations, experiences, philosophy, and values that hold it together, and is expressed in its self-image, inner workings, interactions with the outside world, and future expectations. It is based on shared attitudes, beliefs, customs, and written and unwritten rules that have been developed over time and are considered valid. Also called corporate culture, it's shown in

- (1) the ways the organization conducts its business, treats its employees, customers, and the wider community,
- (2) the extent to which freedom is allowed in decision making, developing new ideas, and personal expression,
- (3) how power and information flow through its hierarchy, and
- (4) how committed employees are towards collective objectives.

It affects the organization's productivity and performance, and provides guidelines on customer care and service, product quality and safety, attendance and punctuality, and concern for the environment.” – *Businessdictionary.com*

5/6/16



# Culture

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- [Businessdictionary.com](http://Businessdictionary.com) 5/6/16





# CASE STUDIES...WHAT WOULD YOU DO?



# Case 1. ABC

## Organization

- 1 person in the business office, 1 assistant and the HOS/President knows the location of the key to the safe
- The prior BO was let go due to misappropriation of cash and the first task for the current BO was to reconcile petty cash and “keep it clean”
- Key location was moved – all 3 parties notified
- Cash was to be handled only with 2 people present
- First reconciliation...completely balanced



# Case 1: ABC Org cont.

- Second reconciliation...off <\$5
- Third reconciliation...off \$40+, BO alerts HOS/Pres
- Key was moved so only the BO and assistant knew the location...next 2 reconciliations no change, off the same \$40+
- HOS/Pres demands to know key location...
- 6<sup>th</sup> reconciliation off \$140+, BO alerts HOS/Pres
- One week later...

# Case 1: ABC Org, cont.

- An envelope appears in the safe with \$200+ in cash and multiple receipts from prior years with a note on the front “from the fired employee's desk”
  - BTW...that desk had been cleaned out a year before and given to another employee
  - Envelope was found and no one in the business office was ever alerted to its presence
  - Remember: only 3 people know the location of the key

THOUGHTS? RISKS?  
LAWS TO  
CONSIDER?



## Case 2: XYZ School/College

- Declining enrollment for the last 3 years
- "Atypical hiring patterns"/later hiring dependent on enrollment are the norm
- For 3 consecutive years, 2 particular employees were contracted in the month prior the start of the semester
- In year 3 of 3, 1 of the 2 employees began to have significant performance issues, all documented and discussed. Employee told not to return for year 4/plan for alternate employment.



## Case 2: XYZ School/College, cont.

- Spring of year 3, same employee has a health issue that requires hospitalization.
- While on the phone with HOS during hospital stay, employee hears HOS say “don’t worry about your employment right now; worry about taking care of yourself and getting better”
- Said employee sues indicating reliance on the verbal contract from the phone call...

THOUGHTS? RISKS?  
APPLICABLE  
LAW(S)?



# Case 3: Ohmy Organization

- Employee: Woman over 40, history of significant performance issues, employed with the organization since 2005 (10 years)
- Have minimal documentation of performance issues until fall 2014 (in 10<sup>th</sup> year), termination plans in process WHEN...
- Winter 2015 employee is diagnosed with stage 3 cancer and requests time off under FMLA
- Receive appropriate return to work “all clear” August 2015

## Case 3. Unity Organization, Cont

- Employee has rough start in fall 2015, asks for reasonable accommodations incl. time off to rest for first month. Accommodations granted.
- Performance continues to be an issue.
- Is accused of making racially insensitive remarks in front of colleagues and customers (more than once). Each incident is discussed with the employee and documented.
- Employee is terminated and employee accuses the organization of firing her because she is sick and an “old woman.”

THOUGHTS? RISKS?  
WHAT REGULATIONS  
SHOULD BE  
CONSIDERED?



SHARE A CASE OR  
SEEK WISDOM  
FROM THE GROUP?



# DEVELOPING YOUR OWN LEADERSHIP STYLE



# Authentic Leadership

“We all have the capacity to inspire and empower others. But we must first be willing to devote ourselves to our personal growth and development as leaders.”

~Bill George, Peter Sims, Andrew N. McLean and Diana Mayer  
in Harvard Business Review February 2007



# Authentic Leaders

- Demonstrate Passion for Their Purpose
- Practice Their Values Consistently
- Lead With Their Hearts as well as Their Heads
- Establish Long-term, Meaningful Relationships
- Have Self Discipline to Get Results
- Know Who They Are

# Level 5 Leaders

## Good to Great - Collins

- Embody a mix of personal humility and professional will
- Ambitious first and foremost for the cause, the organization, the work – not themselves-they have a fierce resolve to make good on that ambition
- Incurable need to produce sustained results
- Set up their successors for even greater success in the next generation
- Attribute success to good luck or others





# Adaptability

- “Executives today face two competing demands. They must execute in order to meet today’s challenges. And, they must adapt what and how things get done in order to thrive in tomorrow’s world. They must develop ‘next practices’ while excelling at today’s best practices.”
  - – Harvard Business Review July/August 2009



# Timeless Principles vs. Daily Practices

“How we deal with change differentiates the top performers from the laggards. But first we must know what should never change. We must grasp the difference between timeless principles and daily practices. Again, most sustainable change is not about change at all but about discerning and conserving what is precious and essential.”

-Harvard Business Review July/August 2009



# Adaptability in Non-Profits

- Create a culture that embraces “courageous conversations” and depersonalizes conflict
- Create common language to discuss sensitive issues
- Create an environment that allows for experimentation (without recourse)
- Distribute leadership
- Mobilize the community to generate solutions



# Leading in the 21<sup>st</sup> Century

- Understand Local, National and Global Issues
- Understand How External Issues and Internal Demographics May Impact Your Organization
- Share Timely Information
- Plan Ahead
- Encourage Experimentation (and the uncertainty that brings)!
- BE VISIBLE!
- COMMUNICATE!



# Developing Your Own Style

“Self-development is very deeply meshed in with the mission of the organization, with the commitment and belief that the work done in this school matters. You cannot allow the lack of resources, of money, of people, and of time (always the scarcest) to overwhelm you and become the excuse for shoddy work”

~Peter F. Drucker



# Take Care of You!

- Attend professional development opportunities: new ideas, connect with colleagues and gather perspective.
- Be involved in your school community. It is very therapeutic and informative!
- Work-life balance
- Schedule time to reflect and adjust course as necessary!



# My GO TO Resources (School)

- My Colleagues!
- [www.nboa.net](http://www.nboa.net)
  - PD, Library, Toolkits, Data, Forums, Net Assets
- [www.nais.org](http://www.nais.org)
  - Library, Demographics, Independent School Magazine
- [www.aimsmddc.org](http://www.aimsmddc.org) /Your regional association
- [www.shrm.org](http://www.shrm.org)
- Harvard Business Review
- Bureau of Labor Statistics (CPI)
- CPA Letter Daily

# Presentation Resources

- Elberse, Anita and Ferguson, Sir Albert. *Ferguson's Formula*, Harvard Business School Press, Boston, MA. 2013.
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- Blanchard, Kenneth and Peale, Norman Vincent. *The Power of Ethical Management*, William and Morrow Company, Inc. New York City, NY. 1988.
- Drucker, Peter F. *Managing the Non-Profit Organization*, HarperCollins Publisher, Inc. 1990.
- Bernardin, John H. (2003) *Human Resource Management: An Experiential Approach Third Edition*. McGraw Hill Irwin.
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