

Name: **Melissa Scudo**

1. The challenge or theme illustrated by this episode:

- Sharing management responsibility with someone with someone with a different leadership style.
- Managing a volunteer
- Addressing perceived conflicts of interest with someone to whom you report.
- Being comfortable with delegating authority to someone who has a different management style.
- Moving a plan forward (when the discussion is stalled in circles) without appearing too aggressive.

2. Brief statement of context:

This example is taken from a planning meeting for a Microenterprise Fair that was to be held as part of an annual conference. The Fair was intended to be a mini-trade show, in which small business owners (micro-entrepreneurs) served by microenterprise development organizations would register for booths and sell their products and services to conference participants (500 people). Planning for the event included: recruiting and registering individuals to exhibit their wares, organizing entertainment and providing a light buffet. The committee was tasked with developing an outline of the event, coordinating and staffing it and developing a budget and fundraising for it.

I was the Executive Director (and only full-time staff) of CAMI. I reported to a 9-member Board of Directors. Sarah Lee, a member of the Board of Directors, volunteered, and was approved by the CAMI Board to chair the planning committee for the Microenterprise Fair. She was responsible for developing an agenda for the event with input from board and staff (staff comprised me and one AmeriCorps*VISTA member), developing a budget and securing funds, and coordinating the day of the event.

In addition to her role as a member of the Board, Sarah Lee was the Executive Director of the Denver Small Business Development Center (housed within the Denver Chamber of Commerce). I mention the affiliations because of their political importance, and to note the many hats that Sarah wore in her role as a board member of CAMI, and her senior management roles at two other organizations.

Sarah was appointed chair of the committee in September 2003. This case study comes a planning meeting in February 2003 (note: this is the first meeting I had participated in since the committee met first in October 2002. Responsibility for staffing the committee had been delegated to a VISTA member that served with CAMI (and reported to me). This person started in August 2002, but terminated her service in December 2002 due to a family emergency). For this reason, I started staffing the meetings.

3. The conversation

(After each statement by one person, use the **tab** key to go to the next row of cells for the next person's statement. When you reach the last row of pre-formatted cells, using the **tab** key will create a new row. Putting each statement in its own cell will improve the formatting when the case is printed.)

<u>My Thoughts and Feelings</u>	<u>What We Said</u>
Melissa: coming into the meeting a little frustrated because to my knowledge, there have been big ideas for the event, but limited action has been taken to plan or fundraise for the event. Feeling that the committee needs a jolt to get moving.	Sarah: "Ok. Let's start the meeting. Barbara do you have the minutes from the last meeting in December 2002?"
	Barbara: "Yes" (goes through minutes and the next steps outlined in the minutes, which included commitments from Eric to follow up with the hotel on catering estimates, and a commitment from Sarah to make calls for fundraising.)
	Sarah: "Is Eric here?"
	Eric is not present at the meeting.
	Sarah: "does anyone know if Eric has contacted the hotel for catering estimates?"
Melissa: most of the people at the meeting are Sarah's staff members, and several people who committed to serve on the committee are not present. Eric, considered a key committee member, is not present and has not communicated on his commitments to anyone.	No responses.
Melissa: A bit frustrated because the ideas for the event seem big but there appears that no action has been taken on fundraising to this date, despite Sarah's assurances since last September. Jane (VISTA member) has been reporting that Sarah had said she was going to contact donors for months.	Sarah: "Ok. Let's go on to the next agenda item. The budget. If everyone looks at the budget, we are trying to raise \$11,000. I need to contact XYZ Corporation, Bank One and Larry's Printing about this."
	Melissa: "Are there any calls or follow-up that I can do to move forward with the fundraising?"
	Sarah: "No. I just need to make the calls."
Melissa: Frustrated, because I think that Sarah wants to protect her donor contacts and wants to be the main point of contact	Melissa: "Well, there are some opportunities to generate some income from registrations. We can generate about \$3,500 from registrations.
	Sarah: "Yes. What is the status of

	putting together the registration form?"
<p>Melissa: Getting a bit exasperated because the question appears to be placed to no one and seems like no one has been delegated responsibility to complete the form.</p>	<p>No responses. A committee members mentions that there was talk of putting a form together but no one assigned responsibility.</p>
	<p>"Sarah: Melissa, can you put together a draft registration form? "</p>
<p>Melissa: Oh no. I am going to be tasked with all the follow-up from this meeting. But, in a way, feel good knowing that it will be done.</p>	<p>Melissa "Sure"</p>
	<p>Sarah. "Thank you, Melissa." Are there any other ideas for the layout of the room and booths?</p>
<p>Melissa: How can we have this conversation without Eric here? It's a waste of time because he is coordinating with the hotel and has the layout.</p>	<p>Sean: "How about renting a climbing wall. It's representative of Colorado and could be fun for participants.</p>
<p>Melissa :That is not a good idea. There are liability issues. Will Sean really take the lead on organizing it? And there is already an agreed upon outline for the event. Why are we still taking new ideas? Also, the budget is already too big and we haven't raised any funding yet.</p>	
	<p>Melissa: "Sarah, can we return to discussing the registration process. By when should I create a draft of the registration form? It would be helpful to create a timeline by when we want to get the registration form out and a deadline for when we want to get registrations so we know how many people we will be working with." (voice is getting a little frustrated and strained at this point.)</p>
	<p>Sarah: Sure, that's a good idea. Can you do a draft by the next meeting?</p>
	<p>Melissa: Sure. When do we want to schedule the next meeting? Can someone help me by editing it before we bring it to the committee?"</p>
<p>Melissa: Getting increasingly frustrated because there does not appear to be an agenda for the meeting, and the discussion is free-flowing, rather than</p>	<p>No one readily answers. Sarah asks Barbara if she will look at it. Barbara says yes.</p>

<p>organized around an agenda. There doesn't appear to be a plan in place working backward from the event. Also am concerned about how the funds will be raised if no one is fundraising except for Sarah. No one is talking during the meeting. People are just sitting here but no one is volunteering to take action steps. Feel like I need to take control!!! But am concerned because my board member is charged with the role of Chair.</p>	
<p>Melissa: feel like I am starting to take over the role of facilitator for the meeting. Noticing a little tension in Sarah's features.</p>	<p>Melissa: Sarah, can we create a timeline for the registration process – getting the form out and flyers?"</p>
	<p>Sarah: "Yes, does anyone have a calendar?" (looks at calendar and selects dates."</p>
	<p>Sarah: "Alright. Let's schedule another meeting in 2 weeks." Everyone opens their calendars to schedule a meeting.</p>
<p>Melissa: Feel like an hour has gone by with no progress at all. Am getting nervous about fundraising and planning.</p>	<p>Melissa (a little exasperated): Can we confirm with Eric that he is available? I think it's very important that he be present for the meeting.</p>
	<p>Sarah; "Yes, Melissa. I will email him."</p>
<p>Melissa: Visibly agitated by end of meeting. Say good byes to everyone but share a look of tension with Sarah. Get a call from Sarah the next day about my actions and tone of voice during the meeting. We talk about my concerns but I feel I have to be very guarded about what I say because of my role as staff and her role as Board member.</p>	<p>Meeting adjourned</p>

4. Lingering concerns, puzzles, or questions:

This is an abbreviated version of this experience. Coincidentally, a week after this meeting I participated in a session of a nonprofit leadership and management course in which the participants completed a "leadership style" exercise. The exercise profiled four different styles of leadership, outlining the strengths and perceived weaknesses of each. The exercise also profiled some areas in which different leadership styles could be negatively perceived and could clash with other styles. It was during this session that I

recognized that my style was an opposing style to Sarah's. The exercise made me aware of the characteristics of my style as opposed to Sarah's and I was able to clearly see why we were butting heads. It was then that I changed my approach to participating in the meetings. It required more work and planning on my part, but it made me feel a lot better and it allowed me to recognize Sarah's strengths as opposed to clashing with them.

Lingering Questions:

- How to ensure you gain input and participation from a group, but still move the process forward? How to welcome all ideas, but sidestep ideas that you feel are not really productive or realistic to your objective?
- If you are a natural organizer and are concerned with driving toward creating results in an efficient manner, how do you know when to stop and collect more input from the group – or when to “gently” steer the group forward?
- Managing agitation (body language and tone of voice).