



Melos Institute

Building a Productive Working Relationship Checklist

Description

Membership-based organizations depend on the insight, support and expertise of their members and professional staff. Both possess a passion and a commitment to serve the organization. Each has the responsibility for moving the organization forward and each has expectations regarding how this should be done. Yet sometimes, members and staff begin each leadership year operating independent of the other. This unintentional action can create a misunderstanding between the leader partners, which can then keep the organization from making important progress.

In a setting where time is a precious commodity, volunteer and staff leaders have limited time to develop a productive working relationship and then use it to further the organization's priorities.

Consider using questions from this checklist (adapted in your own words) to build your next relationship with your leader partner.

Suggestions for Using This Tool

Consider using this tool in the following ways:

- at a private meeting during a leadership retreat where volunteer and staff leader partners have the opportunity to spend time examining these key elements and focusing on ways they can support one another; and
- as a formal or informal agenda item (depends on the volunteer leader) during the first meeting between leader partners (whether in person, over the phone, or electronically).

Key Audiences: Leader Partners

- officers who work with the staff executive
- chairs who work with staff liaisons
- any volunteer leader-volunteer leader or volunteer-staff, or staff-staff relationship

Appropriate Settings for Use

- first meeting between with leader partner
- annual retreats (time allocated for incoming volunteer leaders to meet with staff liaisons)
- where anticipate possible conflict with leader partner (to reinforce your commitment to their success)

Preparation Tips

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Productive working relationships in associations occur when those involved take time to share expectation, preferences, information, skills, and expertise. By taking time to learn more about your leader partner's preferences and expectations, you gain an opportunity to positively shape his or her leadership year.

It also gives you the chance to define and refine those goals (from your organization's plan or committee charge) that are of greatest interest to him or her. In some cases, it might bring greater clarity to the roles that each of you play in governing and managing the organization. Having this kind of discussion demonstrates your commitment as a staff professional to his or her success.

This checklist offers suggested questions, in four key areas, to start a discussion that begins to shape the way you work together; provides greater clarity for how you can be of support, and invites an ongoing dialog to make adjustments as needed to ensure success. Recognize the need to adjust or revise questions in ways that will better suit your leader partner's personality.

Starting the Conversation

Suggested opening remarks. Adapt all suggestions to reflect your own words:
"As we prepare for the coming year, I'm interested in learning more about you, your perspectives, and your general work style so that when we connect - our time together respects your time and fulfills your expectations.

We can use this as a starting point to define the way we work together; and keep checking in throughout the year to make adjustments as needed to ensure your year is both productive and meaningful. "

Professional Style ♦ General Information & Preferences

TAKE TIME TO LEARN MORE ABOUT YOUR LEADER PARTNER'S PROFESSIONAL STYLE:

1. When you think about your personal and professional values, which are most important to you and why?
2. How would you characterize the way you approached your career? Did you plan each step carefully? Take opportunities as they came along?
3. What is your preferred work style? Do you prefer to connect early morning, late evening, during work day? Connect weekly? Only when needed?
4. How do you prefer to be contacted? Email, phone, other?
5. What are your expectations when working with a partner?
6. What haven't we talked about that is important to know about your key preferences?

Operations ♦ Information About How Approach Work

TAKE TIME TO DESCRIBE THE FOLLOWING WITH YOUR LEADER PARTNER:

1. When you look at the association's plan, what priorities or key strategies are of greatest interest?
 2. How would you describe the way you approach your workload? What steps do you take to get tasks completed - jobs done? Do you operate the same way with your volunteer projects?
 3. What words would you use to describe how you like to make decisions? With sufficient information? With just highlighted facts and recommended options?
 4. Tell me three things that are important about the way you like to receive information. We'll start there and keep adjusting until we find what works best for you.
 5. What is your preferred style for handling disagreements? conflict?
 6. What haven't we talked about that is important to know about how you like to work?
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Communication ♦ How Your Leader Partner Prefers to Communicate with Others

TAKE TIME TO EXPLORE THE FOLLOWING WITH YOUR LEADER PARTNER:

1. Material (correspondence, reports, etc.) may be drafted under your signature during your leadership term; it will be forwarded to you for review, edit and approval. What three or four words best characterize the voice, tone and format you would like used when drafting such information (note: share with information with association staff).
2. Keeping fellow leaders informed will be important throughout the year. In the past, we have (insert your present policy and procedures here). Are there any changes you would prefer? If so, what would you like adjusted?
3. Time can sometimes be a critical factor to get things done. And sometimes other volunteer leaders have found their own workloads and deadlines having to take precedence. With previous volunteer leaders we have followed these guidelines (present guidelines here). Will this approach work for you? (if no/not really - in what ways shall we adjust it?).
4. What haven't we talked about that is important to know about how you like to communicate with others?
Conversation to have with your leader partner at a later point in the year:
5. Recognition comes in many forms. When things go well, how will you want to recognize people? You've noticed how other volunteer leaders...and staff have been recognized by previous leaders over the years (if not – give some examples). Recognizing members and other key people helps build a stronger membership community. Here's how we recognize members presently. What do you think about it? Shall we continue in the same way? If not, how would you prefer other volunteer leaders and members be recognized (outside of formal award programs) for their efforts.

Management of Meetings ♦ Support Sought to Ensure Productive Meetings

TAKE TIME TO EXPLORE THE FOLLOWING WITH YOUR LEADER PARTNER:

1. Our goal with respect to meetings has been to develop and distribute information in a timely manner. This gives other members the opportunity to prepare effectively for the meeting. Let's review the current process and adjust as needed. (Note: discuss how the agenda is drafted, materials compiled and distributed to volunteer leaders in a timely fashion, etc.).
2. During meetings, I normally provide support in the following ways (describe how you support the board/committee chair). How do you feel about this? In what ways shall we make adjustments to ensure you gain the greatest participation to have a productive meeting?
3. You know the talent and expertise that we have on our board/committee. That can sometimes make for very boisterous yet productive discussion. There are many ways I can support you in your role as meeting chair. Here are some that I've used with other volunteer leaders. (note: discuss support with agenda development, time monitoring at meetings, handling conflict and aggression, facilitation techniques/driving toward decision-making). Do these work for you too? Or which do you prefer to use? What haven't we discussed that you would done to support you?
4. What haven't we talked about that is important to know about how you like to manage meetings?