LIBRARY BOARD CONDUCT AND THE CHALLENGE OF TEAM BUILDING

by Jeanne T. Farah and Sally Otte

*T*he gavel falls...

The roll call taken...

And the minutes approved...

Where are you? You are attending your first library board meeting.

How did you become a member of the library board and what do you do next? You have a million questions about how the library is run, how the board functions, what special interests the other board members have and what techniques you need to develop to get done what you want done. But, wait a minute. Step outside the immediate situation and take time to think.

Why were you appointed to the library board?

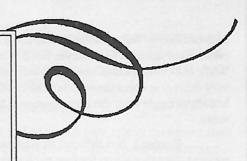Was it because of your political party?

Was it because of your interests in children or literacy or history?

Was it your professional expertise as a lawyer, accountant, teacher, etc...?

Maybe it was just because you are a parent and an active member of the community?

Whatever the reason, you have now officially entered a public arena, perhaps for the first time. The public library is a keystone institution of your community. Its operations are funded primarily by property taxes and that means that everyone in your community has a stake in what happens with the library. As a library board member, you are therefore responsible to all of these people and not just the group that appointed you. Nor will it be possible for you to represent just a special area or interest group of your community. In your deliberations you will have to take a broader perspective and look for the benefit for the entire community. In other words, you are now no longer a private citizen but a public official working to make your community better and you are also open to all the scrutiny and criticism that comes with that position of public trust.

Let's get back to the moment. You are at your board meeting. There are other board members sitting at the table with you. Also present are the library director, the board attorney, library staff, some media representatives, and the public. Remember, all of your decisions must be made in the full view of the public eye. That's what the Open Door Law demands. The library's board meetings are not public forums but rather public meetings where members of your community can monitor your discussions and deliberations. The intent is to keep public boards accountable, but for the new board member, the concept of public discourse takes some getting used to.

Another important thing to remember is that decisions are now being made in a group and proclaimed by the group. Perhaps you have heard the expression, "the board speaks with one voice." Everyone at the table brings something special to the discussions. By listening and contributing at each meeting, individual board members learn about the issues and decisions that have to be made. The final decision is made by the vote of the individual members with the majority ruling and, regardless of individual views, this final decision is conveyed as being made by one entity—the library board. The board is a strong voice in the community when all of the members support the decisions and demonstrate that they are working together as a team to achieve the goals of the library.

It takes strong teamwork if library boards are to discuss options productively, reach agreement on decisions, and speak with one voice to their public.

How hard can this be? If this were a basketball game, you have just been sent in as a substitute without any instructions!

You are sitting at the table with people you do not know and yet you are supposed to act as a team player. Not only are they strangers to you, they may also differ one from another in experience, personality, education, values, interests and especially in their opinion of the public library's role in the community. For such a diverse group of people to function effectively as a team, there must be strong agreement in what they are expected to bring to the table and how they are expected to play their part on the team.

Clarifying the expectations for board conduct clearly improves each member's ability to contribute to sound governance of the library. Before immediate issues on the library can be addressed, a board with new members must address its desired methods of deliberation, decision-making and communication. In today's world, the process by which boards and management teams reach agreement on their methods is called team building. Practiced in the business sector for some time, team building techniques have resulted in high levels of customer satisfaction was well

as profitability. For a public board, team effectiveness is often more difficult to achieve, but it is no less important. While the difficulties of achieving team effectiveness will vary from one community board to another, all public boards struggle with the three common barriers to team-work.

Barrier 1. It is difficult to achieve candid working relationships that allow for free exploration of issues when the public is watching and listening to every word. For example, board members may not be comfortable asking questions or experimenting with innovative ideas on issues in front of reporters or a television camera.

Barrier 2. Library board members are volunteering their time and have additional family and career responsibilities. As a result they do not have full days to devote to the task of developing a working knowledge of library issues, let alone to establishing team relationships with other board members. It's hard enough to keep them longer than two hours for a board meeting.

Barrier 3. Unlike corporate boards and staff who are often selected for their like-minded and single-minded commitment to an agenda, public board members are selected to mirror the diversity of interests in the community. It is not often easy to find the common ground on which an inclusive organization like a public library can build for the future.

Because of the increasing strength of these barriers, library boards have found it beneficial to use professional facilitators to conduct team building sessions and regular retreats. The purpose of these events is not to conduct the ongoing business of the board. They are (1) held off site and advertised as a non-business meeting, (2) scheduled for a full day or more, and (3) professionally facilitated so that the views of individual members will be considered while the focus on the broadest public good is maintained.

Team-building sessions should be designed by a professional facilitator with experience working with public sector organizations. Using input from the board members and the library's staff, the facilitator develops topical content and participatory activities that will enhance team skills in ways that are needed.

The time and effort board members invest in the team building session produce significant results for the long term. First, there is the intangible psychological benefit of the individuals coming to a consensus on value statements. Secondly, there should be three written products that form a solid basis for future decisions. These are as follows:

1. Board Member Norms

These are clear rules of conduct describing behaviors that board members all agree that they can expect from one another and that the public can expect of them. Norms go beyond, but do not replace, the rules of parliamentary procedure or bylaws. Norms may address interpersonal skills such as the practice of active listening. Behaviors such as when and how board members are expected to interact with the media or state legislatures regarding library issues may be addressed.

Many boards review and update their norms every year because the situations they are currently facing may call for the clarification of additional role expectations. It is essential to review the norms whenever a new board member joins the team. A rule of thumb is that a board team should always begin its review of current norms with a discussion of those norms that are most difficult to practice. This will get the real concerns about working together on the table and resolved.

2. Board and Organizational Values

These are statements of ethical and cultural underpinnings of the organization that do not change as often as the situation changes. They are intended to withstand the tests of time. When a board team invests the time up front to reach agreement on the core values that define the library's role in the life of the community, then it is easier and quicker to evaluate options, make decisions and publicly explain decisions during the normal course of conducting board business. When this foundational agreement does not exist, then even the smallest decisions can become the cause of counter-productive dissention.

While values statements often last for decades, many libraries are rethinking their values today as the 21st century approaches. The information age is indeed causing taxpayers and their elected representatives to challenge all libraries to provide services that produce benefits equal to or greater than the investment required to maintain competitive technology.

3. Principles of Governance

This product should be developed as an addition to general governance policies already established by the board. Governance statements (a) define the current organizational structure within the board regarding appropriate and timely committees and task forces, (b) specify the relationship of the board to the library's director and staff, and (c) clarify any links to other entities supporting the library such as Friends groups, elected governing bodies, foundations, and joint venture partners. The purpose of gaining agreement on the principles of governance is to clarify the boundaries of decision making. Clear boundaries enable all board members to take full responsibility for the decisions that are rightfully theirs and to recognize which decisions belong to non-board groups. Clear boundaries also prevent the board from using its limited time to micromanage issues that should be handled by the library director and staff. These principles will also enable the library to work well with other organizations within the community. As the resources needed for success continue to increase, more partnering, and hence better governance, will be required of

all boards. Those boards which micromanage internal issues will not be ready to look outside their own systems for opportunities to work together in the larger community network.

To be asked to sit on a library board is to be asked to become part of a team that acts as a guardian to one of your community's most valuable assets. The library is more that a system of buildings and a collection of materials. It is a living and breathing organization that is going through a rapid period of growth as it works to keep pace with the changes in the community. Your success as a guardian will be determined, not as an individual, but as a team. It will not be based on your ability to preserve the library, but on your ability to guide it as it matures to the next level of service. Will our library be stronger and better able to meet the expectations of the public at the end of your term that it was on the day you first took your seat? The answer can most certainly be "Yes" if you and your fellow board members have the opportunity to build the skills that enable highly effective teams to work together for the public good.

CASE STUDY: RETREAT OF THE INDIANAPOLIS-MARION COUNTY PUBLIC LIBRARY BOARD

In 1995-6, three new members were appointed to the Library Board of IMCPL, replacing members who had each served 16 years. As the board was faced with sensitive decisions, the necessity of new team dynamics was clearly evident. Using a professional facilitator, the library board met on a Saturday to discuss board governance and strategic direction. The agenda included discussions of assumptions of board activity, mandates of law and ownership questions as well as roles of the board and staff in the decision-making process. The document below developed in the course of the retreat was a result of team building activity and has proved valuable in establishing the common ground for decision-making. The retreat served as a first step in re-inventing a board for effective governance.

LIBRARY BOARD EXPECTATIONS OF BOARD CONDUCT

The following is a list of norms that the IMCPL Board determined were necessary levels of commitment required of each member in order for the Board to function as a team in the governance of the library:

1. Knowledge of the Library's Plans, Programs and Policies.

Board members personally, and with the help of staff and fellow board members, shall continually strive to become knowledgeable about the library's governance as well as its current long range plan, programs and policies. This continued education process includes but is not limited to meet-and-greet sessions, board orientation, annual board retreats and expertise shared in special meetings.

2. Use of Financial Indicators.

Board members shall understand the fiscal structure, including funding and revenue sources, taxing author-

ity, evaluation of financial need, the budget process, and the valuation of the return on investment of the services provided with dollars from the taxpayers and other funders. (accountability)

3. Support of Board Decisions.

For the good of the Library, board members shall be willing to compromise with other board members to reach optimal decisions and then support the decisions of the board after they are made.

4. Productive Board Interaction.

Board members shall maintain mutual respect and courteous interaction without personal attacks and take responsibility for creating the environment for the interchange of various opinions in a civil climate.

5. Knowledge of Goals and Objectives (Success Indicators)

Board Members evaluate the Library and its systems based on established criteria (success indicators) for achieving goals and objectives. These criteria are established annually in relation to a long range strategic plan, a component of the master plan for services, facilities and technology.

6. Relationship with Director.

Board Members recognize the different level of responsibility borne by the Director and, through interactive communication, develop and convey both confidence and trust in the Director. Board members respect the confidentiality of the relationship, discussing any board members concerns about the Library's performance with the Director prior to discussions with other individuals or the public.

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