

FIRST PUBLISHED

1986

OCTOBER

MIE JOURNAL

## THINGS WE WISH WE HAD KNOWN WHEN WE BECAME PROJECT DIRECTORS

By Cynthia A. Metzler and M. Victor Geminiani

*At the time of this article, Cynthia Metzler was a consultant with Daryl Punches Associates, Inc., in Washington, D.C. She is now President and CEO of Experience Works, meeting the training and employment needs of low-income seniors. Victor Geminiani was the Executive Director of Legal Services of Northern California. He is currently is Executive Director, Lawyers for Equal Justice. Victor may be reached at victor@lejhawaii.org.*

During the past few years, when comparing notes about our work as project directors, we found that our separate experiences led us to similar conclusions about managing legal services. We know that experience is the best teacher. Still we think — perhaps naively — that if we had only known more, life would have been easier. We hope that at least some of the lessons we learned the hard way can be passed along to newer directors and managers. So we offer you our catalogue, in no order of importance, of the things we wish we had known when we became project directors.

### 1. Carry a Vision

Effective leaders have a clear vision for their work and their program, one they can convey to those they lead. This vision must be explainable and justifiable if it is to gather popular support and acceptance. Ideally it can be expressed succinctly, like “the New Deal” (Roosevelt), a “new frontier” (Kennedy) or “quality” (Iacocca).

Our Board, staff and client community look to us as project directors to establish a vision for our program. What are we trying to create? Does it make sense? Is it achievable? If so, how? The task of creating and realizing a vision is the most difficult and most important of a project director’s work, because all our decisions flow from it — decisions affecting recruitment and retention of staff, case priorities, organizational structure, public perception, and the like. Without a compelling vision agreed upon by all, these critical decisions will inevitably be made in a haphazard way,

which can lead to confusion and resistance.

Ask yourself today if people understand what you are ultimately trying to accomplish in your program. Do they invest in your goal through their activities? Do your program decisions complement the goal and increase the likelihood of achieving it? If not, you may wish to assess your direction and find answers to these questions.

### 2. Know Your Program’s History

They say that those who ignore the lessons of history are bound to repeat the mistakes of the past. Each program has a unique history, which includes its roots, important events and personalities, program and community conflicts, funding growth or retractions, and external and internal frictions. To make difficult, often controversial decisions involving your program’s development, you need a foundation of knowledge about its history. We think that the importance of this knowledge is underrated by many project directors. Most programs have been around for a decade, if not much longer. Today’s issues are the results of past decisions. Without knowledge of the past, you run the risk of engaging in a blind decision making process.

It is relatively easy to become familiar with your program’s history. Look at board minutes, talk to staff members who have been around for a while, meet with former Executive Directors, Board Chairs or other members, and read old memos and monitoring reports. The time it takes will be repaid in more informed discussions and valuable decisions.

### 3. Keep in Touch with Staff

A disastrous effect of battles with LSC over the last several years has been precious time and energy drained from project directors. When we add to this the time necessary to resolve internal and external conflicts, plan, fund raise, facilitate Board activity, and so on, the day is often over. If you as director asked a

staff member to infer what you most value, judging from your use of time, you might learn that you have inadvertently set a tone contrary to your hopes for the program. Competent, dedicated staff may be largely ignored while we turn our attention to the conflicts and crises begging for attention daily on our desks.

*In Search of Excellence*, a book on management by Peters and Waterman, tells of a manager who spent 80 percent of his time out of his office, managing by “walking around.” He proudly explained that he was trying to reduce time spent in the office to ten percent, having found that the longer he spent in his office, the more problems he created for his staff. As we hear managers and directors around the country bemoan the gap between their hopes for their programs and what is actually occurring, we wonder how much of this gap can be attributed to LSC, the current staff and program environments. What about how we choose to spend our time and energy? You can convey your vision and values by interacting with individual staff members at least two or three times per year. We believe the frequency, nature and quality of the interactions needs to be substantial enough to allow a “trickle out” effect. If you cannot spend time with all staff, everyone at least needs to be aware of how you have spent time with others. The desirable result is to have staff around at all times who are familiar with what you are doing, and why.

More importantly, frequent interaction with individual staff will allow you to stay ahead of major problems by dealing immediately with present minor problems and anticipating future ones. Our ultimate job as managers is to facilitate the successful resolution of staff concerns. We need to allow these concerns to emerge through frequent interaction with staff.

#### **4. Use Your Middle Managers Effectively**

Two areas that need attention in our relationships with middle managers are delegation and setting out clear expectations.

Clear and supportive delegation is essential to building a productive management structure. Delegation provides opportunity to nurture professional growth. It also frees you up to accomplish program goals and (from a selfish viewpoint) to pursue the activities you enjoy.

Project directors often try to “protect” managers from issues not directly related to legal work or staff development. In this situation the project director maintains sole responsibility for problem solving, administrative functions, dealing with funding sources, and other overall program functions. The result can

be isolation and frustration. Other results may include poorer decision making because of the fewer minds at work; lack of ownership of decisions, hence lack of buy-in for implementation; blaming the project director or distancing from the director’s actions or inaction.

If you find it difficult to delegate many of your administrative responsibilities, you may want to ask yourself if your current middle managers are adequate for the job. If their competence is not the problem, some self-examination may be in order as to your personal motives for hoarding responsibility.

As to setting out expectations clearly, the absence of this skill can lead to inadequate performance, confusion, misunderstanding and resentment. We often fail to communicate expectations to others because we are unsure ourselves exactly what we want done. We also may not want to be clear about our expectations, for fear that the other may disagree. If expectations do not coincide, avoiding the issue is no solution. Instead, an honest negotiation process needs to occur to reach mutual agreement and accommodation.

If unacceptable performance is at issue, immediate steps need to be taken to discuss and remedy the situation. Making endless excuses for unacceptable performance — instead of confronting and remedying the situation while remedies are still possible — leads us to assume responsibility for others’ conduct and deprives our managers of a chance to learn and improve performance.

#### **5. Decision Making Is Situational**

Should we make the decision or should others participate? Many legal services managers vacillate on this question.

The first step in a decision situation is settling on an appropriate process. The decision-making process you choose is key to the quality and implementation of the decision. The right process will vary depending on who has knowledge needed for making the decision; who has to implement the decision; how much time is available; the requirements of a collective bargaining agreement; the nature and importance of the decision itself; the importance of acceptance of the decision; how difficult it might be to achieve implementation; how well the potential group of decision-makers will work together, and whether they have adequate leadership.

The egalitarian, participatory culture of legal services often creates an atmosphere where anyone’s desire to participate in decision making is presumed to be valid. The result can be too many meetings and concern

© THINGS WE WISHED WE HAD KNOWN  
Continued from page 51

---

that too much time was devoted to the process. All too often, the necessary decision never gets made, reminding us that “not to decide, is to decide.” In some cases, resentment builds up among participants because they feel that they were not listened to or their involvement was a sham.

Whatever your choice about the degree of participation, those who are consulted should be informed of the nature and degree of their involvement at the outset. If staff are only giving input, they should know this; those who believe they will make the decision will likely be resentful if they disagree with it. For a manager to be obscure about final authority while hoping for consensus or agreement is a dangerous and misleading ploy.

Past decision styles and practices will have an impact on the process you choose. Past process may result in no decision, poor decisions, decisions not implemented, or increased hostility in the program. Any of these results may be a signal that a new approach to decision making is appropriate. If you do depart from past practice, explain your reasons to minimize speculation and confusion.

An entire article could be written on process and decision making styles. Our basic message here is to choose a relevant and feasible process based on each situation that arises.

## 6. Planning Works

In earlier years, when LSC was particularly vigorous in its onslaught of policy change and information searches, we felt like we were being pulled along on a train with a runaway engine. Creating space to plan became critical so we could feel that we were directing our programs instead of allowing them to run aimlessly, on their own steam.

Planning has taken on negative connotations in legal services. Much planning is viewed as an endless process which has no result. Our view is that planning allows you to be creative and to have a sense of where you want to go. Plans provide the basis for proactive rather than reactive work. The planning process allows you to educate staff about issues, gather opinions, ease isolation of individuals and offices, take on projects that would not ordinarily get done and show participants how their effort fits into the grander picture. Planning around delivery of services to clients is a better place for a director to be involved with staff and their work, than planning around administrative issues.

The director plays a key role in creating plans for the program, especially at the policy level. The director is the one person required to have the total internal and external picture of the organization. On some issues the director is particularly equipped to propose plans for others to react to. On others the management role might be better relegated to creating a process and then actively ensuring that implementation occurs. It seems to us that those who are most involved in implementation or most affected by the issue should be involved in the planning process.

Negative attitudes about planning can be changed by being serious about follow-through, by building in ways to measure small, visible results as part of plans, and by quickly examining why plans have gone astray.

We prefer a series of localized planning efforts to one integrated effort for the total organization. The smaller plans may overlap and interconnect and build to a total organizational plan.

What works for one group of staff members may not work for others. For example, complex litigation planning by staff who are too inexperienced, or who lack the resources to carry out the work, may not result in litigation.

Managers need to examine their desired outcome to determine whether a planning process will help or hinder. Our experience has shown that making a pretense of planning is worse than no plans at all. But a realistic and visionary set of plans can serve as a road map during difficult times, when perpetual forces seem to be at work to thwart you from your program goals.

## 7. Change, However, Takes Time

Individual and organizational changes do not occur overnight. The barriers are enormous. When as individuals we attempt to make changes in ourselves, we need to let go of old behaviors, attitudes, and feelings. Most often, this requires experiments and practice before we can feel comfortable with the new. The same holds when we try to make changes in organizations. We encounter the history, attitudes, behavior patterns, and norms of the organization, its components and its individuals. We face the existing policies, procedures and practices as well as the environment in which the organization operates. The established ways of operating and behaving, no matter how unpleasant, are at least known. The changed way, however wonderful its promise, still appears different and threatening.

Project directors, especially new ones, who try to implement change may face resistance from those who created or benefited from the established methods.

Before making any change, it is helpful to assess who created the current situation, why it is maintained, who benefits from it, who will benefit from a change and who will lose something from the change. Consider, too, whether staff may perceive that they lack the ability or skills to operate in any different way. Each of the preceding issues, unless anticipated and addressed, can lead to a change effort which fails.

Other complex forces preclude rapid change at the organizational level. Understanding these forces permits the project director to maintain a long range perspective, allowing for constant experiments and false starts on the road to one's goals.

## 8. Confront Conflict and Differences

Managers must value the differences that individuals and groups bring to the organization, rather than fear or deny them. Differences are natural; conflicts are inevitable. Indeed, without them there would be no creativity or energy in an organization.

Management of conflict and differences requires a level of skill which many of us wonder if we possess. Law school focused more on resolving disputes to the satisfaction of one party, than on how to manage the interpersonal dynamics of differences on an ongoing basis. Many managers attempt to smooth over or avoid conflict because they are unsure of their own competence in such matters.

We have found that most conflict will not resolve itself and, if avoided, will escalate. Use of power or tactics of winning and losing which characterize a litigious approach to problem solving are not likely to result in a satisfied staff. One of the key skills of a project director or manager is to be able and willing to recognize a potential or actual situation of difference or conflict, to diagnose it and to confront it in a flexible, non-antagonistic manner.

Confronting behavior requires the manager to know and to voice what you want and to be willing to actually listen to the wants of others. The skills to manage conflicts between third parties are also necessary. The style a manager uses to face conflicts will vary depending on the persons involved and the situation.

## 9. Acknowledge Informal Organizations

Subgroups and informal organizations exist in every organization. To recognize them and their impact on the morale and effectiveness of the organization is an important undertaking for a project director. To ignore their existence is to court unproductive conflict.

Informal subgroups or organizations can be dis-

concerting for those in formal leadership positions, because they are not the leaders of the informal organizations. Some may even feel their power and authority to be undermined or threatened. Regardless of the reasons for informal organizations to exist, the leader needs to try to understand them. What needs of the individuals involved are being met by the organization; why has the formal organization failed to meet these needs? These informal organizations will continue to exist as long as they meet the needs of their members.

Managers need to be aware when actions or inaction of the formal organization might be influenced by the sub-organizations. They need to gather input from leaders of the informal organization on needs not being addressed by the program or significant changes of policy. It may be, for example, that the most influential attorney in the program lacks a formal leadership role, but is the person to whom all other advocates go for information and advice. This person's opinion is no doubt important to acceptance of a programmatic litigation change desired by the formal leadership.

The formal leader cannot lead the informal organizations unless you happen to be part of them. And if that is the case, it is a source of potential conflict with those who are not part of your informal subgroup or allegiances.

## 10. Avoid Memos Whenever Possible

Attorneys seem to love paper and written communication. Maybe this preference was gained during law school. However appropriate written communication is to other circumstances, it is often inappropriate when a manager is trying to communicate with staff. The desired results — understanding, agreement, compliance, or the beginning of a serious dialog — rarely emerge. Instead, memos typically bring on a combination of these reactions: a) Relief (you didn't waste my time by talking to me); b) Anger or hurt (why didn't you discuss this with me first, or why didn't you care enough to talk to me directly?); c) Confusion or uncertainty about what is really being communicated, sometimes accompanied by anger, disgust or frustration); d) Rejection, through efforts to rally forces that will change your mind or attempt to undercut what you said; e) Distrust (you are afraid to talk to staff and thus are hiding behind a memo); f) Resignation (you have already invested so much into your idea that discussion is pointless.)

Chances are that even the clearest memo will encounter these reactions; but they are almost certain to occur when you use a memo to announce a change which affects the way individuals work, where the is-

© THINGS WE WISHED WE HAD KNOWN  
Continued from page 53

---

sues involved are ones they know and own. In such circumstances, communicating with staff other than verbally will rarely result in acceptance or compliance.

Verbal communication creates an opportunity for you to state your position, and then clarify it. It allows the staff to give input and perhaps influence the discussion. When you hear the responses and questions of others you may wish to exercise flexibility and modify the suggested change.

Whether intended or not, written communications take on an aura of finality. Furthermore, if the memo creates confusion and hostility, you may not realize it until difficulties with implementation occur. We believe only the simplest, least controversial of issues should be communicated initially via memo. All other issues should be subject to verbal dialogue before a memo is sent. Although many subjects need to be finalized in writing, the issue here is how staff are first approached about the matter. If the use of a preliminary memo is deemed advisable, some disclosure about the nature and purpose of the memo may help to control unwanted reactions which may hinder your goals.

### 11. Participate Actively in Hiring

A successful program must have staff with the interests and skills necessary to carry out its tasks. When vacancies occur through expansion or turnover, important opportunities arise for a manager to create change. Hiring selections can dramatically affect the quality and nature of the legal services delivered to clients. They can influence the tone, value structure, atmosphere, morale and culture of the organization, and the type of supervision, management and leadership you provide. Hiring choices will also affect the type of recruits attracted to your program in the future.

In light of the far-reaching impact of hiring decisions on the director's ability to create, implement and maintain a vision of the program, recruitment and selection is a fundamental and critical dimension of the director's role. Because of the opportunity it provides to influence the direction and future of the program, we believe it should never be delegated completely.

In order for recruitment and selection to result in fortunate hiring decisions, the program must first identify the traits, skills, qualities and values it needs to carry out its mission. Traditional but vague selection criteria like "commitment," "intelligence" or "competence" may be the source of future confusion regarding

a match between individual, staff goals and interests, and those of the program; such words may not mean the same to everybody. All those involved in the hiring of staff should establish agreement about the specific hiring criteria, and a common understanding, of their meaning.

For some reason, inquiring about an applicant's attitudes and values is a scary prospect, if not a forbidden one. Questions of this nature, however, may address the concern expressed by many experienced leaders that a gap exists between their vision of legal services and the type of law which is practiced in many programs. If particular values, experiences, or attitudes are important to carrying out the program's mission, use the time spent reviewing resumes, interviewing, and checking references to find out whether the applicant possesses these traits.

In the event the program is in transition and the director is purposely leading the transition, the type of staff which the director believes is necessary for the program may differ from the type of staff which the program has traditionally hired. In such circumstances, there are several options available: attempt to make connections between the traits of the new staff you want and the traits possessed by existing staff; be prepared to sell your criteria to staff actively; be willing to face criticism and hostility; or, when necessary, compromise on candidates who possess most of what you are looking for, if not everything.

The director, of course, is not the only stakeholder in hiring. Staff members, other managers, and unions all have their interests and claims. The director, as the formal leader, needs to facilitate, lead and manage a hiring process that serves the ends of the total program. In most cases, such efforts can succeed by your establishing the hiring criteria (with other management and staff involvement); being involved in some aspects of the screening process (by reviewing applicants on paper or by overseeing others who are engaged in the process); and by participating in the interview process.

Naturally, in larger programs, it may not be feasible for the director to participate in the hiring of all staff. Director involvement is fundamental for those who are deemed critical to the program's mission. For others, it is sufficient to set the parameters of authority for the managers who do the hiring. If inappropriate people are hired, a more meaningful use of the probation period may reduce future serious conflict.

## 12. Do Not Take Union Activities Personally

The formation or presence of a union in a legal services program presents unique challenge to the project director. In many cases, directors philosophically believe in unions. Nevertheless, they feel personally attacked by the formation of a union and by positions taken by the union.

Ultimately unions and management may share the goal of providing legal services to clients, but unions are separate entities with their own organizational goals. The project directors are not the leaders of these organizations, nor do they direct their activities. In fact, one function of a union is to represent members in their dealings with directors.

It is difficult for a director not to feel attacked or mistrusted by staff who have decided to create their own organization with its own leadership to interact with you, the formal leader of the program. In spite of this, it is possible for a director to focus on the positions and issues involved and to try to remove personality from being at issue. Of course, many issues do become personalized (either by management or labor), but the director is not without clear choices whether to take on the personalization of the issues or to try to see yourself more as a symbol of the position. As director you usually have real options about how you behave.

The ways project directors act in the role enhances or diminishes the potential for personalization of labor/management relations. The behavior you choose will tend to escalate or defuse tension, conflict and personalization of the situation. Sometimes it takes two to maintain a conflict.

## 13. There's No Success Like Failure

Since creativity comes from experimentation, managers who want creativity from staff must permit mistakes to be made. To expect that every decision is the correct one is unrealistic. Mistakes and errors only become problems when instead of learning from them, we continue to repeat them. By examining what went wrong and why, we can learn from our failures and build new successes.

Those who permit themselves to make mistakes are more tolerant of others mistakes. You set an example through willingness to admit your mistakes and experiment until a solution is reached. Staff who believe there is no penalty for not succeeding on the first try are more likely to try something new. This creates an atmosphere that is the source of innovation, creativity and energy.

Managers in their late 30's, 40's and 50's have a

history of failures and successes which have led to the refinement of their judgment, instinct, values, and opinions about legal services. Younger staff need to be permitted to err and learn, and experienced managers need to allow themselves the same latitude.

## 14. Seek Out Peer Support

The role of project director is unique. Traditionally, it holds more power and authority than any other position. No matter how much power is shared or how much participative management employed, the fact remains that the director is ultimately responsible for the success or failure of the program. The role offers tremendous responsibility and challenge, as well as stress and anxiety.

Although we can find support and encouragement from Boards of Directors; management team and staff, each of these groups has limited responsibilities and organizational perspectives. More importantly, others in a program tend to rely on the director for support and encouragement. In order to seek help from others inside a program the director needs to be willing to put aside the sense of infallibility and all-knowingness. To expect your support needs from these individuals may feel risky; it can be scary to demonstrate vulnerability. Indeed, such a demonstration may be inappropriate to certain situations; but in many cases where support is solicited, facilitated and encouraged, it is forthcoming.

Because of the diversity of roles within a program, developing relationships with other project directors is one key to success and sanity. Supportive relationships with other project directors create a safe opportunity to discuss issues and strategies and to learn how others would approach an issue. It allows us to build friendships at the same time. A support network can serve to reduce one's isolation and paranoia as well as increase the quality and energy of one's devotion to the job. In the end such relationships can reduce the stress of the job and perhaps even prolong the time a director remains productively in the position.

## Conclusion

The list of topics we could include here is endless. Those we selected we believe are significant to the personal and organizational success of a project director. Each topic deserves more attention than can be given in this newsletter, and we hope that the article leads to discussion and comment among directors and managers. We invite your commentary for publication in these pages. With such dialog all of us learn and grow.