CHAIR LEADERSHIP DEVELOPMENT PROGRAM

DAY THREE

APRIL 25, 2019
Clint Sidle & Chet Warzynski
9:00 a.m. Review Lessons from Day 2 and Agenda for Day 3
Review Homework Assignment: Developing a Strategic Plan

9:30 a.m. Strategies for Engaging Faculty in Team Building and Strategic Planning
- Future Search
- Open Space
- Carousel Technique
- Learning Panels
- Action Learning Groups

10:30 a.m. Break

10:45 a.m. Team Building Exercise: Developing a Culture of Realistic and Measureable Expectations

Noon Lunch

1:00 p.m. Models for Leading Change
Simulation: Developing a Strategic Plan for Your Department

3:00 p.m. Break

3:15 p.m. Leadership Feedback from Other Colleagues
- Creating a Personal Development Plan for Future Growth
- CUNY Resources for Department Chairs

4:30 p.m. Follow Up: Building and Maintaining a Support Network

5:00 p.m. Evaluation and Adjournment
Based on your experience what are the differentiating characteristics of ineffective and effective teams? Think of the *best* team and *worst* team you’ve ever been on.

<table>
<thead>
<tr>
<th>Ineffective Teams</th>
<th>Effective Teams</th>
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WHAT ARE TEAMS?

A team is a group of people with complementary skills who are committed to a common purpose, set of performance goals, and approach for which they hold themselves mutually accountable.

Katzenbach and Smith, The Wisdom of Teams

Source: Katzenbach and Smith (1993) The Wisdom of Teams
TEAM PERFORMANCE CURVE

- **Pseudo-Team**
  - Common purpose
  - Have a charter
  - No coordinated action

- **Working Groups**
  - No common purpose ... other than to complete the task at hand
  - Focus on individual performance
  - Incremental results

- **Potential Team**
  - Collaborative effort but no mutual accountability
  - Ineffective in overcoming barriers
  - Incremental results

- **Real Team**
  - Complementary skills
  - Commitment to team purpose & performance
  - Mutual accountability
  - Able to overcome barriers
  - Potential for step-change performance impact

- **High Performance Team**
  - Meets all conditions of real teams AND ...
  - Members deeply committed to one another’s personal growth

Source: Katzenbach and Smith (1993) *The Wisdom of Teams*
RESEARCH FINDINGS ON BUILDING TEAMS*

A. PROBLEMS REPORTED BY TEAMS
   ▪ Domineering, arrogant, and hostile personalities
   ▪ Lack of individual commitment to the team
   ▪ Lack of openness and communication of team members
   ▪ Power struggles between two or more individuals
   ▪ Lack of trust between team members
   ▪ Lack of flexibility of team members in considering alternative views
   ▪ Insensitivity to diversity issues, including individuals from other cultures
   ▪ Not dealing effectively with conflict when it develops
   ▪ Work overload and stress from too many assignments
   ▪ Ineffective team meetings – some meetings lasting 8-12 hours
   ▪ Lack of advance preparation of team members for meetings
   ▪ Differences in leadership styles
   ▪ Lack of a workable problem solving and decision making process
   ▪ Lack of time and stress management
   ▪ Inability to integrate or reconcile vastly different ideas and approaches
   ▪ Strained relationships
   ▪ Lack of competencies by individuals

B. BEST PRACTICES REPORTED BY TEAMS
   □ Respect and value other team members
   □ Identify and build on each other’s strengths
   □ Complete homework assignments prior to meetings
   □ Limit the time of each meeting to two hours
   □ Establish a charter (contract) and norms for the team
   □ Use a chart pad or black board to focus discussion and record findings
   □ Assign a leader or facilitator to manage group dynamics
   □ Brainstorm early in the meeting to get everyone’s ideas out in the open
   □ Set boundaries on the amount of information on the table at any one time
   □ Maintain a sense of humor
   □ Be honest and sensitive to each other’s needs and feelings
   □ Challenge ideas rather than individuals
   □ Seek to understand before being understood, i.e., listen to each other
   □ Debrief after each assignment and develop an improvement plan
   □ Be flexible and patient with each other

* Chet Warzynski, Johnson Graduate School of Management, MBA Core Teams Research Study, Cornell University, 2000-2002.
I. **The step ladder theory of team development:** as a team leader, it is important to know a general theory of how teams develop.

   ![Step Ladder Diagram]

   - Safety
   - Trust
   - Synergy
   - Task
   - Vision

II. **Team Action Learning Cycle:** In building a team, a team leader needs to know how the team learns from experience and incorporate that action learning process into the development of the team.

   ![Action Learning Cycle Diagram]

   - **Do:** Practice, pilot, experiment
   - **Plan:** Envision, conceptualize, revise
   - **Check:** Measure, assess, feedback
   - **Reflect:** Why? Is it worth changing?
III. The task and process: in assessing a team dynamic, a team leaders needs to consider both the content and process issues of the team.

<table>
<thead>
<tr>
<th>TASK</th>
<th>PROCESS</th>
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<tbody>
<tr>
<td>“The What”</td>
<td>“The How”</td>
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<tr>
<td>The subject</td>
<td>The methodology</td>
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<tr>
<td>Ideas</td>
<td>Problem approaches</td>
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<tr>
<td>Agenda</td>
<td>Decision procedures</td>
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<tr>
<td>Goal</td>
<td>Guidelines</td>
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<td>Discussion elements</td>
<td>Style of interactions</td>
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IV. THE TWO ASPECTS OF PROCESS:

METHODS  RELATIONSHIPS

The “how” that’s focused on getting the work of the group accomplished.

The “how” that’s focused on getting the psychosocial needs of the group satisfied and maintained.

- Idea generation methods
- Decision processes
- Agenda
- Time frames
- Problem solving steps
- Testing agreement
- Consensus testing

Supporting Behaviors:
- Including
- Encouraging
- Supporting
- Checking-in

Hindering Behaviors:
- Dominating
- Withdrawing
- Avoiding
- Degrading
<table>
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<tr>
<th>Functional Requirements</th>
<th>Key Questions</th>
<th>Outcomes</th>
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</table>
| A. Goal Attainment           | 1. What are we trying to accomplish?  
2. How will we go about it? | • Goals, Plans, Values, and Vision                                      |
| B. Role and Resource Allocation | 3. Who will do what work, with what resources? | • Roles and Budgets  
• Responsibilities & Authority                                        |
| C. Integration               | 4. How will we work together?                     | • Norms and Ground Rules  
• Relationships                                                           |
| D. Pattern Maintenance       | 5. What policies and principles will guide us?  
6. How will we make decisions and solve problems? | • Policies, Procedures, and Practices  
• Decision-Making and Problem-Solving Process                            |
| E. Tension Management        | 7. How will we deal with differences and resolve conflict? | • Conflict Resolution Process                                             |
| F. Adaptation (Change)       | 8. How will we evaluate and improve our performance? | • Evaluation and Improvement                                              |

 TEAM BUILDING/CULTURE SETTING QUESTIONS

1. What should be the contributions of this cohort or network of chair leaders to CUNY?

2. What should be the values or operating principles of this network of chair leaders in pursuing these contributions?

3. What norms or rules should we adopt to facilitate cohesion, teamwork and organizational citizenship?

4. How should the network make decisions and communicate those decisions?

5. How should we resolve differences of opinion and conflict?

6. What goals, projects, actions, opportunities, or action items should we pursue to benefit CUNY?
BEST PRACTICES FOR TEAMS*

1. **Build Commitment: ensure that team members and stakeholders take personal responsibility and commit to project inputs and outputs.**
   - Involve all team members from early stages of the project
   - View all stakeholders including users, suppliers, etc. as insiders
   - Invite stakeholders to participate in the project as equal partners
   - Define the contributions of every stakeholder as equally important
   - Lead by exhibiting global and integrative thinking
   - Emphasize consensus building

2. **Build information environments and transparency: ensure high levels of information exchange and openness to encourage integrative thinking.**
   - Insist on elimination of hidden agendas and on honesty and openness in communication
   - Educate team members about the techniques of effective communication
   - Demonstrate genuine interest in knowing about divergent orientations
   - Forage information from within and outside the project for decision making

3. **Facilitate and coach team members and stakeholders: learn how to facilitate and coach effective contributions of stakeholders.**
   - Coach team members, encourage acquisition of knowledge and skills to capitalize on talents
   - Create opportunities for team members to develop their interests and talents
   - Shield team members from bureaucratic forces and organizational politics
   - Forage information and resources to facilitate the project’s and team’s initiatives
   - Empower others to develop their own objectives and strategies

4. **Strengthen human interaction to develop relationships: team members must become skilled at building relationships and resolving interpersonal and team issues in addition to technical issues.**
   - Select the right mix of team members based on technical and interpersonal skills
   - Sponsor team building training and focus on building interpersonal skills
   - Build a team to foster a sense of belonging by focusing on relationships within the team
   - View conflict as an opportunity to develop new alternatives and constructive problem solving
   - Define the team as the only legitimate forum for making decisions

5. **Foster team learning: encourage learning for high levels of flexibility and creativity.**
   - Support risky ideas and innovative actions; encourage team members to act like entrepreneurs and risk takers
   - Focus on the link between the project and the larger environment, and on the opportunity for learning
   - Foster autonomy and freedom to make mistakes; encourage team members to share their agendas and actions with the larger team

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<thead>
<tr>
<th>Barriers/Pitfalls</th>
<th>Comments</th>
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# Five Responses to Change

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<tr>
<th>Response</th>
<th>Behavior</th>
<th>Attitude</th>
<th>Getting “Unstuck”</th>
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| **Victim** | • Resists Change  
• Feels angry or depressed  
• Reverts to old ways of doing things | • Why is this happening to me?  
• Why can’t things stay the same?  
• I just have to wait and see what “they” will do to me this time. | The “victim” response may be considered a south behavior. To get unstuck from this response, try taking charge of and responsibility for what’s happening in your life. |
| **Critic** | • Looks for reasons why change will not be a success  
• Fails to see any positive outcome from the change | • This has never worked before and it won’t work now.  
• “They” don’t know what is going on or what they are doing  
• This will just make things worse | The “critic” response may be considered a west behavior. To get unstuck from this response, think about the possibilities and opportunities that are or could be open to you, how and what you could do to influence change. |
| **Bystander** | • Acts reluctant to get involved  
• Waits for others to take the lead | • If I ignore this change, it will go away.  
• I won’t jump in until I know it’s safe.  
• I’ll wait until others have made the decisions | The “bystander” Try to find out how change impacts you, i.e., seek information, find out what roles you can play in change efforts. |
| **Charger** | • Leaps before looking  
• Pushes others too hard  
• Does not listen to others | • I know best and I’ll just force it to happen.  
• I don’t need more information.  
• Do it my way, and do it now! | The “charger” response may be considered a north behavior. To get unstuck from this response, examine how the change impacts others, i.e., seek information, engage additional input before making or suggesting change. |
| **Navigator** | • Looks for ways to reduce negative reactions  
• Explores reasons for change  
• Finds ways to be useful in change  
• Looks for opportunities to improve  
• Forms positive and supportive relationships with those affected by the change | • This change presents opportunities to do things differently.  
• It’s a chance to do things better.  
• I’m bound to make mistakes, but I’ll learn from them.  
• I am in control of how I feel about the change. | The “navigator” is the balanced and centered. Being in this role helps the person help themselves and organization move successfully through change. |
## KOTTER MODEL FOR LEADING STRATEGIC CHANGE

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<tr>
<td>1. <strong>Establishing a Sense of Urgency:</strong></td>
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<td></td>
<td>• Examining market and competitive realities</td>
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<td>• Data gathering to make the case for change</td>
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<td>• Identifying and discussing crises, potential crises, and opportunities</td>
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<td>2. <strong>Forming a Powerful Guiding Coalition or Leadership Team:</strong></td>
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<tr>
<td></td>
<td>• Assembling a group with enough power to lead the change effort</td>
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<td>• Encouraging the group to work together as a team</td>
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<td></td>
<td>• Design and manage the process, pilot ideas</td>
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<td>3. <strong>Creating a Vision:</strong></td>
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<tr>
<td></td>
<td>• Creating a vision to help direct the change effort</td>
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<td>• Developing strategies to achieve that vision</td>
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<td></td>
<td>• A working hypothesis to be tested and vetted with others</td>
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<td>4. <strong>Communicating the Vision:</strong></td>
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<td>• Using every vehicle possible to develop two way dialogue on the vision and strategies</td>
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<td>• Creating social operating mechanisms for communication</td>
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<td>• Teaching the new behaviors by the example of the guiding coalition</td>
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<td>5. <strong>Empowering Others to Act on the Vision:</strong></td>
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<td></td>
<td>• Getting rid of obstacles to change</td>
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<td>• Aligning systems, incentives, and structures with the vision</td>
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<td>• Encouraging risk-taking and non-traditional ideas, activities, actions</td>
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<td>6. <strong>Planning for and Create Short-term Wins:</strong></td>
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<td>• Planning for visible performance improvements</td>
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<td>• Creating those improvements</td>
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<td>• Recognizing and rewarding employees involved in improvements</td>
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<td>7. <strong>Learning from experience:</strong></td>
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<td></td>
<td>• Getting feedback on results</td>
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<td>• Reflecting on that feedback</td>
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<td>• Revising the plan</td>
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Tight budgets are the reality at CUNY again this year as they are at so many other colleges and universities across the nation. With endowment balances showing only modest gains, research funding declining, and other sources of support flat or trending downward, what can be done to maintain academic standards, reduce spending, and generate new sources of revenue.

For the past several years, when funding shortfalls were more modest, the university’s approach was to ask deans and department heads and staff to minimize waste and improve efficiency within their own departments. This budgeting approach resulted in minor savings coupled with some across-the-board cuts in operating budgets, largely in administrative areas. Unfortunately, cuts in operational areas and peripheral academic services have resulted in work overloads and poor morale. Many units are struggling to fulfill their missions and maintain standards of excellence.

In light of this history and a less than positive forecast for the future, what strategies or actions might be considered to mitigate the economic difficulties faced by the university? The customary budget-cutting strategies of across-the-board cuts (larger on the administrative side, smaller and more targeted on the academic side) and insubstantial annual increases in tuition appear to be no longer sufficient to carry the institution through the economic difficulties of the next several years and beyond.

Your Challenge
To address these circumstances, a leadership group comprised of intelligent and dedicated academic chairs is meeting to explore options for dealing with the current situation. In advance of the discussion, the members of the group have been asked to consider three questions:

1. What options do you propose for consideration?

2. What are the benefits and downsides associated with each?

3. What option would you recommend and why?
The need to gather information from multiple disciplines and knowledge domains on future directions is critical in academic decision-making and planning. A future search conference provides a vehicle for accomplishing this in a way that satisfies most participants and improves individual commitment. A future search conference is a participatory planning and decision-making process in which a group of individuals with diverse experiences from the same or different disciplines come together, engage in a process of data collection, discussion, and learning, and decide an appropriate course of action. The search conference itself may involve from ten to hundreds of people in a focused and collaborative discussion around issues and challenges facing the organization.

A future search conference is based on the premise that the people most closely associated with the work have valuable information and experience for making effective decisions and determining appropriate actions. The participation of these individuals in an open and self-regulated planning and decision-making process leads to greater understanding, commitment, and results.

The search process consists of four major activities: data collection, data analysis, decision-making, and action planning. The process begins with a structured inquiry based on several key questions about the organization and its environment. The data generated from this inquiry are aggregated and classified into themes. The implications of the themes and proposed actions to address the issues and challenges facing the organization are identified and ranked by the participants. Finally, an action plan is developed to achieve the desired results.

**Goal**

The goal of this strategy planning exercise is to simulate the development of a strategic plan for the university.

**Objectives**

1. Engage faculty and staff in data collection and action learning process
2. Identify and document key themes from the data collected related to the organization’s mission, vision, values, strengths, weaknesses, and opportunities
3. Reach consensus on key themes and ideas for moving the organization forward
4. Determine the next steps for completing the planning process.
FUTURE SEARCH QUESTIONS

It is best to have participants consider these questions in advance of the future search. The questions are the heart of this design. Some sample questions are indicated below.

Planning Questions for Simulation

1. What will be the major challenges for CUNY during the next 5-10 years?
2. What do you think are CUNY’s greatest internal strengths?
3. What do you think are CUNY’s greatest internal weaknesses?
4. What do you think are CUNY’s greatest external opportunities?
5. What do you think are the most important things CUNY should do to serve its students?
6. What can be done to improve faculty well-being in the next 1-3 years?

Other sample questions:

1. What do you expect to be the dominant characteristics of the social, political, economic, and cultural environment we will find as the 2000s progress?
2. What are some of the skills graduates we will need in order to thrive over the next 10-20 years?
3. What are some of the things we will need to do differently in the future in order to help our stakeholders to thrive in the 21st Century?
4. What are some of the internal challenges we may have to acknowledge and address as we work to develop the kind of capacity we will need in the future?

Planning Process

1. Participants Conduct 2 or 3-Minute Interviews
2. Small Groups Aggregate and Classify Data
3. Group Leaders Present Reports
4. Group Identifies and Prioritizes Main Themes: H = Highly Representative of the Group S = Somewhat Representative

U = Unique
FUTURE SEARCH INTERVIEW DESIGN

Small Group Discussions

Question 1 Group

Question 2 Group

Question 3 Group

Question 4 Group

Question 5 Group

Question 6 Group
A. Call to Engagement Questions

1. What should we be teaching our students? What intellectual dispositions, character traits, and essential knowledge should we be nurturing? How can we inspire our undergraduate, graduate, and professional students to become intellectual and moral leaders of their communities? How can we prepare them for well-rounded lives that incorporate artistic, athletic, cultural, humanitarian, political, and social dimensions?

2. How should we be teaching? Have new technologies and research on how students learn created possibilities for better pedagogy, or are they mere distractions? What kind of mentorship, inside and outside the classroom, should we provide our students at the different stages of their educations?

3. Whom should we be teaching? What mix of undergraduates, graduate students, professional students, and non-degree students will best help our university achieve its educational mission?

4. Where should we be present? As our world has changed, we have added new places where we teach those who would earn degrees. How much should we be extending ourselves, our resources, and our reputation around the globe?

5. What does our land grant mission mean today? What forms of extension and public service are the best modern expression of our outreach program for contributing to the practical education of society? Should we do more to ensure that the fruits of our research become part of the fabric of the larger society?

6. How should we collaborate? We already collaborate with other great universities in the United States and around the world, on projects large and small. What other institutional partnerships, international and domestic, might permit a scale of endeavor that would allow us to accomplish things we cannot do alone? With whom might we collaborate, closer to home, to enhance and/or strengthen our ties to our local communities and region?

7. Should we be identifying special domains of research emphasis where we are unusually well situated to make enduring and significant contributions? Can such identification be reconciled with the highly adaptive decentralization that has been one of the hallmarks of research innovation at our institution? We have already identified some candidates for special emphasis: information science and computing technology, post-genomic life sciences, and nanotechnology. Additional themes which have the potential to draw on multiple disciplines where the University has great strength might include: technology and society; race and religion; globalization’s consequences; humanity’s relationship to the natural and built environment; peace, liberty, and security; and global health.

8. How should the University be organized? Our complex web of institutional structures and processes has, for the most part, provided a healthy mix of stability and flexibility. But are some features anachronisms? Do new forms of knowledge production and dissemination require different structures? Might organizational changes better enable faculty, students, and staff to achieve their individual and institutional ambitions?

B. Institutional Planning Questions

1. What do you expect to be the dominant characteristics of the social, political, economic, and cultural environment in which graduates will find themselves as the 2000s progress?

2. What are some of the academic, technical, personal life- and community-related skills graduates will need in order to thrive in the next ten years?
3. What are some of the things our department will need to do in research and development to stay on the cutting-edge of our disciplines?

4. What are some of the things we will need to do differently in the future in order to help students thrive, i.e., what are some of the new elements we should consider building into the educational experience, academic and social, if we are to achieve our vision and our graduates are to thrive in the 21st Century?

5. What are some of the internal challenges or issues we may have to acknowledge and address as we work to develop the kind of capacity we will need in the future?

6. What objectives, new projects, programs, or initiatives do you think your department should pursue over the next ten years?

A. Traditional Strategic Planning Questions
   1. What are the major contributions of your department to society (consider all your stakeholders)?
   2. What are your department’s core values in pursuing its mission?
   3. What would you say are the major strengths of your department in accomplishing the mission?
   4. What would you say are the major limitations or weaknesses of the department in accomplishing your mission?
   5. What new opportunities might your department seize over the next 2-5 years?
   6. What threats will your department face in the next 2-5 years?
   7. What goals or objectives should the organization consider over the next 2-5 years?
   8. What strategies, initiatives, programs, projects, or actions could help you to achieve your goals and objectives?
   9. If you accomplish your goals and objectives, what would you like your department to become?
B. Academic Planning Questions

1. What should we do to improve or expand the College’s professional education program and/or postgraduate program?

2. What should we do in order to improve or expand the College’s clinical and/or basic research?

3. What should we do in order to improve or expand the College’s primary care or specialty services?

4. What should the College do in order to better position itself as a resource for addressing vision and health needs of the community?

5. What should the College do in order to provide a more positive and supportive organizational/community culture for the faculty?

6. What should the College do in order to provide a more positive and supportive organizational/community culture for students?

7. What should we do in order to engage faculty in the governance of the College?

8. How can we use technology more effectively to achieve teaching, research, patient care, and service objectives?

C. Curriculum Development Questions

1. What mechanisms would be effective at increasing communication amongst faculty members who teach in related areas?

2. How can we integrate evidence-based patient care into the curriculum?

3. What faculty development activities would help us move the revised curriculum forward?

4. What technologies or learning tools would help faculty members accomplish more integrative teaching?

5. The clinical setting can be a vehicle for integration. How can the clinics be restructured and/or student clinical assignments be modified to expand the opportunities for such integration to occur?

6. How can the traditional classroom be used for case discussions to achieve integration of material?

7. How can curriculum keep pace with the rapid growth of development in science and technology?
In this exercise each member is assigned one of six questions and has five minutes to collect responses to their question from every other member of their small group using a nominal group process in which each person is asked to respond to the question with no discussion. This process is repeated for all six questions. At the end this data collection period, each person analyzes the data for their question and codes the ideas based on the number of times they were mentioned by other participants, e.g., if 3 or more participants mentioned the idea, is coded as “highly representative” of the group’s thinking; if 2 people mentioned the idea it is coded as “somewhat representative,” and if only one person indicated the idea, it is coded as “unique”.

In the breakout session that follows, individuals with the same question form a new small group and aggregate their findings. The small groups then identify themes that are (a) highly representative of the data collected; (b) somewhat representative of the data collected; and (c) unique to the data set. The small groups then describe the major themes using the language in which they were expressed, and develop a narrative and graphic illustration of their findings.

In the final step, a volunteer from each group makes a 10-minute presentation of the findings to the full group. Each group report is followed by a short plenary discussion in which the leader of the small group tests for consensus and support.

To follow up the exercise volunteers are solicited from the group to construct white paper that summarizes the group’s answers to the strategic questions. This narrative is distributed to the group for final revisions. The group then convenes to discuss and ratify the agreements reached on the questions.
CREATING A VISION STATEMENT

There is an important need in any organization to have employees work toward a shared picture of the future. Unfortunately, most employees do not feel real ownership for an organizational vision because they have little or no involvement in its creation.

This engaging, collaborative design fully involves all participants, developing a shared vision of the future that they are committed to achieving.

The facilitator needs to make a short and engaging lecturette on the importance of an organizational vision. The following notes will be helpful.

An organizational vision serves to uplift aspirations, foster commitment and galvanize energies toward shared goals. A good vision combines both the heart (it pulls you in, it touches you) and the mind (it is logical, makes good business sense).

A vision engages and motivates people because it connects us to what is important and gives meaning and energy to our work. Visioning is a creative process of focusing on an “ideal” future that is descriptive, ennobling, and practical. We create visions by examining what we want, defining our values, and engaging in “informed” dreaming. The goal is to create a picture of the future that is worthy of our efforts.

“There is no more powerful engine driving an organization toward excellence and long-range success than an attractive, worthwhile, and achievable vision of the future widely shared.” Burt Nanus

THE ACTIVITY

1. Individuals are given approximately 10 minutes to write four or five statements that describe what they would like to see their organization, business, or group become in the next five years. You want them to dream boldly, but also realistically! It should be something they would be willing to work hard for; be committed to; and can be accomplished.

Examples:

- “We will reward and recognize our employees for excellent performance.”
- “We will provide a world class (education, product, service) to our (students, customers).”
- “We will value collaboration and teamwork.”
- “We will respect the diversity of all our employees and see it as a strength upon which we can build.”
- “We will provide equal access to a quality education for all our students.”
- “We will return a healthy profit to our investors and maintain high standards of ethics and values.”

2. After the participants have had time to write their own individual “beginning” vision statements, they should be placed into small groups.

Each small group’s goal is to spend about 30 minutes crafting their “beginning” vision statement on newsprint. It should represent the group’s ideas of a rough draft of a vision statement for their organization. In doing this there are two important rules:
Rule #1: The group first seeks “common ground,” the vision statements that all group members have in common with each other.

Rule #2: After common ground has been reached, the group will move to “gentle agreement.” This means seeking ideas people may not have thought of themselves, but agree are good ideas they would be willing to work for/toward.

3. Each group of six now pairs up with another group of six. The goal of the larger group of twelve is to create a common ground draft of a vision statement on newsprint. Once again, the same rules apply. They are:

   Rule #1: Seek common ground first—i.e., those statements which both groups share.

   Rule #2: After common ground has been established, seek gentle agreement on the rest of the vision statement. Remember, it does not go on the newsprint if someone opposes or can’t live with the statement.

4. The ultimate goal is to have a 50-75 word statement written on newsprint. The groups will have approximately 30 minutes for this. Using the beginning vision statements from each group, and after reaching agreement, a larger group vision statement. (Remember, you are looking for a rough draft, not a finished piece.)

5. After the groups of 12 have created their beginning draft on newsprint, they will present their vision statements to the whole group (all participants in this case). This will make four presentations. Their goal is to present their vision, so make sure they have a presenter. After they have presented it, post each group’s written vision statement on the wall for later use.

6. After all four presentations have been made, the facilitator has two options:

   a. You have four potential visions after the groups make their presentations. At this time, the facilitator should explain to the large group that they will use the “Las Vegas” voting procedure to determine the best of the four vision statements.

   b. They need to put their votes on the vision statements they believe best represents the values, beliefs, and picture of the future they want for their organization. After people have voted, one vision statement usually (about 90 percent of the time) emerges as the strong favorite.

7. You can then have people do a “Treasure Hunt” which is a search for those ideas you don’t want to lose from the other three vision statements. This is done by asking participants which ideas from the other statements they would like to see included in the final vision statement.

8. Now you should have one “favorite” vision statement plus other ideas participants would like to see included. You can now take another break and work on polishing this statement with the help of a few participants. This will again be presented to the entire group after the break for their final input and approval.
COLLAPSING CONSENSUS FOR IDENTIFYING STRATEGIES

This is an activity designed to solicit input and build gentle consensus in an efficient and effective way. The main goal is to seek common ground.

In adapting this process for identifying strategies, first ask the participants to consider all the work they have done so far – the data gathering, the mission and vision development – and then identify what 3-5 strategies are essential for moving forward.

1. Ask people to consider this question and have them write down their responses. In other words, given this data, what are the 3-5 strategies for moving forward.
2. Ask two people to pair up and come up with a common 3-5 responses they can agree upon. This be ones that overlap in their individual responses or entirely new ones that arise in their discussion.
3. Have 2 pairs then get together for group of 4 and ask them to do the same thing.
4. Ask the groups to report out what they have while the facilitator writes the responses on newsprint. As the group reports each of their items ask if any of the other group has a similar response. Meld the similar and redundant responses on newsprint into a single response. Typically if the facilitator is asking for 3-5 responses per step, the total, after excluding overlap, will be about 10-12.
5. Conduct a Las Vegas vote (see below) to identify the top 6. In terms of strategies, anything more than 6 will typically spread the energy, commitment and focus too thin.

LAS VEGAS VOTING FOR NARROWING THE OPTIONS

1. If there are 10-12 items to be voted on, tell participants they have 5-6 votes to distribute among the ideas as they choose. This means they can put 1, 2, 3 or all of their votes on a single idea if they want.
2. Have people hold up their fingers to vote. Count the number of fingers and mark the total next to the idea.
3. After the votes, pick the top not more than 6 ideas and ask if this still makes sense. If so that is not, if not then ask for more input.
**LARGE GROUP CHANGE PROCESS**

**Co-create to Communicate:** People will support what they helped create.

**Shared Vision and Process:** The future direction as well as the process for how to get there needs to be clearly articulated and broadly shared.

---

**Advisory group:**
Design, organize, and implement process. Collect data and make the case for change

**Large group:**
Conduct SWOT. Draft mission, vision, values, and strategies

**Task forces:**
Refine mission, vision, values and strategies. Collect broader feedback.

**Large group:**
Consolidate, refine, and prioritize. Create ‘tipping point’ for change.

**Advisory group:**
Further refines, sharpens, implements, monitors, revises. Makes the tough decisions.
BRANDING YOUR VISION

What is the impact for your organization and those you serve?

What stories could you tell?

What are some catchy phrases or mottos?

What would the headlines be?
BEEHIVE EXERCISE

Purpose:
The Beehive method is an interview technique to collect feedback for individuals. It can be used:

- To generate ideas.
- To develop a greater understanding of an issue, topic, and even to develop a research question.
- To evaluate the impact of a particular program, policy, or issue.
- To gain key stakeholder support.
- To increase the status of your research project by involving high-status people as respondents.
- When people with extensive knowledge or expertise are involved.
- When the cohort to be interviewed is relatively small.
- When you need rich, in-depth information.

Process:

1. Write 2-3 specific questions on an index card that you would like the group to give you feedback on, e.g., How do people view me? What do you perceive my strengths as a leader? What can I do to be even more effective?
2. Exchange cards
3. Collect information via interviews
4. Provide feedback to the person
5. Share findings with coaching teams and larger group

Interpretation:

☐ What patterns or common themes emerge?
☐ Are there any deviations from these patterns? If so, how can these be explained?
☐ What interesting ‘stories’ emerge from the responses?
☐ Do any of these patterns suggest that additional data may be needed?
☐ Do the patterns that emerge corroborate the findings of any corresponding qualitative analyses that have been conducted? If not, what might explain these discrepancies?
1. What are my strengths, my special talents?

2. What do I do when I am at my best? Can you give me an example?

3. How have your impressions of me changed since the beginning of the program?

4. What personal challenges might I still have that I may need to navigate?

5. What is the one thing you wish for me?

6. What are my strongest leadership qualities?

7. What comes to mind when you think of me?

8. What should I do more or less of?
Name:_________________________________________

Question 1:

Question 2:
FEEDBACK ON QUESTIONS

Question 1:

Question 2:
WHAT IS PERSONAL MASTERY?

1. **Personal Responsibility** – From victim to victor
   - A sense of personal empowerment
   - Pro-activity

2. **Personal Vision** – From imagination to reality
   - What you stand for – taps into a deep passion
   - Frame of reference by which everything is examined

3. **Personal Authenticity** – From knowing to doing
   - Alignment of what you do with what you believe
   - The basis of personal power and influence

4. **Personal Journey** – From the acquired to the innate
   - It takes practice and time – presence and perseverance
   - For some, the journey is the goal
**CLARIFYING PERSONAL VALUES**

*Identify Values.* Personal mission statements are based on our values. Values are our true motivators. They give us insight into what is right and wrong, and what we consider worth pursuing in life. They reflect our basic goodness, guide our decisions, and lead us to regard what goals or ends are most legitimate.

Identifying personal values is not easy. This exercise helps by presenting an entire list of possible values for guiding our lives. Most of these will seem important to most people. The challenge, however, is to identify those that are intrinsically most rewarding and inspiring to you. We want to identify your most important values: those that are your strongest motivators, your greatest source of joy when satisfied, and your greatest sense of frustration when not.

This exercise is adapted from *Leadership from the Heart* activity by Blessing/White Inc. In all my years of doing this work, this is the most effective activity I have found for identifying personal values. It presents a list of values and asks you to make choices among them, to consider what values are most important. So in making these choices, ask:

1. **Absolute or Should.** Are these values important to me because they are internally driven, or are they externally driven? “Absolute” values are part of who you are intrinsically. “Should” values are those driven by the expectations of others.

2. **Means versus Ends:** Why are these values important to me? Some values are means to another end. Economic security, for instance, is often a means to achieving freedom. Freedom, then, would be the more important value.

3. **Words versus Actions:** Do these values mirror my actions? If not, then are they truly important to me? For example, when we identify health as an important value but continue with poor eating habits, health might represent a “should” as opposed to being something that is really important to us.
**Step 1:** From the following list of 46 values, check the 15 most important to you.

<table>
<thead>
<tr>
<th>Value</th>
<th>In General</th>
<th>At Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement (attaining goals, sense of accomplishment)</td>
<td></td>
<td></td>
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<tr>
<td>Advancement (progress, promotion)</td>
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<td></td>
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<tr>
<td>Adventure (new and challenging experiences)</td>
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<td></td>
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<tr>
<td>Affection (being included, connecting to others)</td>
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<td></td>
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<tr>
<td>Altruism (good will, charity)</td>
<td></td>
<td></td>
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<tr>
<td>Authenticity (genuineness)</td>
<td></td>
<td></td>
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<tr>
<td>Balance (between work and play)</td>
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<tr>
<td>Beauty (aesthetics in nature, art, or life)</td>
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<tr>
<td>Calm (peaceful, mild, relaxed)</td>
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<tr>
<td>Competence (capable, effective)</td>
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<tr>
<td>Commitment (loyalty, dedication, dependability)</td>
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<tr>
<td>Competitiveness (winning, taking risks)</td>
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<tr>
<td>Cooperation (collaboration, working with others)</td>
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<td></td>
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<tr>
<td>Courage (risk-taking, toughness)</td>
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<td></td>
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<tr>
<td>Creativity (being imaginative, innovative)</td>
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<tr>
<td>Discipline (perseverance, focus)</td>
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<tr>
<td>Economic Security (steady, adequate income)</td>
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<tr>
<td>Equality (egalitarianism, opportunity for all)</td>
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<td></td>
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<tr>
<td>Fame (renown, distinction)</td>
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<td></td>
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<tr>
<td>Family Happiness (close relationships with family)</td>
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<tr>
<td>Flexibility (agility, ability to adapt)</td>
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<td></td>
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<tr>
<td>Forgiving (tolerance, patience)</td>
<td></td>
<td></td>
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<tr>
<td>Freedom (independence, autonomy)</td>
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<tr>
<td>Friendship (close relationships)</td>
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<tr>
<td>Health (physical and mental)</td>
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<tr>
<td>Inner Harmony (at peace with self)</td>
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<td></td>
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<tr>
<td>Integrity (honesty, sincerity)</td>
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<tr>
<td>Involvement (belonging, participating with others)</td>
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<tr>
<td>Loving (affection, tenderness, intimacy)</td>
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<tr>
<td>Objectivity (rational, logical)</td>
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<tr>
<td>Openness (approachable, accessible, vulnerable)</td>
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<td></td>
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<tr>
<td>Order (organized, structure, systematic)</td>
<td></td>
<td></td>
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<tr>
<td>Passion (energy, excitement about life)</td>
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<td></td>
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<tr>
<td>Peace (harmony, conflict-free)</td>
<td></td>
<td></td>
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<tr>
<td>Personal Development (learning, personal growth)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pleasure (fun, enjoyment)</td>
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<td></td>
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<tr>
<td>Power (influence, authority)</td>
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<tr>
<td>Recognition (prestige, respect of others)</td>
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<td></td>
</tr>
<tr>
<td>Self-Respect (self-esteem, sense of personal identity)</td>
<td></td>
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<tr>
<td>Value Statement</td>
<td></td>
<td></td>
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<tr>
<td>-----------------------------------------------------</td>
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<tr>
<td>Service (assisting others, improving society)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spirituality (faith, religious belief)</td>
<td></td>
<td></td>
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<tr>
<td>Status (level in society)</td>
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<td></td>
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<tr>
<td>Stewardship (responsibility to the whole)</td>
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<tr>
<td>Vision (clarity, seeing the way)</td>
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<tr>
<td>Wealth (abundance, getting rich)</td>
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<td></td>
</tr>
<tr>
<td>Wisdom (understanding life, insight, enlightenment)</td>
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</tbody>
</table>
**Step 2: Now pick the top 10**

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________
6. ______________
7. ______________
8. ______________
9. ______________
10. ______________
Step 3: Now from the above data, pick the top 5 and rank them in descending order of importance:

1. ____________
2. ____________
3. ____________
4. ____________
5. ____________

Step 5: For each of the top 5, write a personal definition of what that value means to you. My top value, for example, is freedom, and my definition is “The freedom to explore both my inner and outer world so that I can grow to my fullest potential.”

1. ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

2. ________________________________________________________________
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3. ________________________________________________________________
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4. ________________________________________________________________
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5. ________________________________________________________________
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   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

Step 6: Finally, for each of the top 5, rate yourself on a scale of 1 to 5 on how well you are modeling them in your life right now (5 being always, 1 being you have a lot of work to do).
1. List some personal characteristics you feel great about. These should be nouns.

*Examples:*
- technical expertise
- strength
- sense of humor
- energy
- enthusiasm
- courage
- creativity
- insight
- patience

I have ________________________________

___________________________

___________________________

___________________________

___________________________

For me these characteristics were coach, facilitator, servant, challenger, and creativity.

2. List ways you successfully interact with people. These should be verbs.

*Examples:*
- teach
- support
- collaborate
- serve
- inspire
- produce
- lead
- motivate
- plan

I ________________________________

___________________________

___________________________

___________________________

___________________________

For me the key words were inspire, motivate, awaken, serve, and challenge.

3. Visualize what your perfect world looks like. What are the people doing and saying? Write a description of this perfect world.

My perfect world ________________________________

___________________________

___________________________

___________________________

___________________________

For me it was: “Everyone has awakened to their inherent basic goodness and they are authentic in being that in the world.”

4. Combine two of your nouns, two of your verbs, and your definition of your perfect world.
My life purpose is ______________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
For me it was “I use my coaching and facilitating skills to awaken everyone to their inherent basic goodness and inspire them to be that in the world.”
DEVELOPING PERSONAL VISION

Writing Down the Bones
(Personal Journaling Technique à la Natalie Goldberg)

- First thought, best thought.
- Keep your hand moving; don’t pick it up off the paper.
- Don’t cross out.
- Don’t worry about punctuation, grammar, or spelling; don’t go back.
- Lose control, don’t edit.
- Don’t think or get logical, or worry if it makes sense.
- Go for it!

Sample Personal Visioning Questions

- Five years from now, I am proudest of ...
- When my friends talk about me they say ...
- Fifteen years from now I can teach others ...
- The 27 things I want to do before I die are ...
- At the end of my life I am known for ...
- If I had just six months to live, I would ...
- I am willing to make a stand on ...
- My unique calling or purpose is ...
- I am happiest when ...
- What I enjoy doing most is ...
- My unique opportunities are ...
What are you doing to develop all four dimensions of your nature?
PREPARING A PERSONAL MISSION STATEMENT

Definition:

A set of values, principles or philosophy that provides the basis for making major, life-directing decisions, and the basis for making daily decisions in the midst of constantly changing circumstances and emotions. It empowers individuals as their source of personal strength and conviction.

Possible Components:

Values:
Values are your true motivators. Not just what you think is right or wrong, but what you consider worth pursuing in your life. Your values determine your sense of personal worth. Your purpose and your vision will stand on the foundation of your values.

- Set of beliefs or principles that guide our decisions
- Lead us to regard some goals or ends as more legitimate than others

Purpose:
A powerful purpose is based on deeply held values and becomes the standard for empowering and giving timeless strength to an individual. When looking at the lives of people who have made an impact on this world, they have been very conscious of a driving purpose that has given them the energy and commitment to achieve the extraordinary.

Vision:
If purpose is the course you have set for your journey, then vision is the destination. A specific, powerful, personal vision creates energy, motivation, and commitment. It is a powerful picture that we carry in our hearts and our minds. It is an expression of our purpose and values. It is a tangible, challenging, vivid and inspiring picture of the future.

- A picture of a purpose achieved
- A view of the future
- Dreaming and thinking ahead
- An imaginative conceptualization of the future

You may find your mission statement to be more balanced and easier to work with, if you break it down into the goals that you have for the various roles you have in your life such as a colleague, parent, friend, and change agent.
Questions to consider:

- What are my talents that I want to leverage?
- What is my ideal for myself as a leader ... and on what values are these ideals based?
- What is my ideal for myself as a friend, spouse, partner, family member ... and on what values are these ideals based?
- How do these roles blend or conflict?
- How do I want to be involved in community at home and at work?
- What do I value for myself in terms of health and freedom?
- What do I want to create in terms of personal learning and development?
- What is my unique calling or purpose in this life?

Things to avoid (the Seven Deadly Sins of Steven Covey):

- Wealth without work
- Pleasure without conscience
- Knowledge without character
- Commerce without morality
- Science without humanity
- Religion without sacrifice
- Politics without principle
**DEVELOPMENTAL PLANNING WORKSHEET**

**GOAL:**

**EXPECTED OUTCOMES:**
What will be different?

What will I gain by achieving the goal?

**STRATEGIES FOR DEVELOPMENT**

**Seek New Challenges/Projects**

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Specific Action/Time</th>
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**Take Courses and Workshops**

<table>
<thead>
<tr>
<th>Course Workshop</th>
<th>Specific Action/Time</th>
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<tbody>
<tr>
<td></td>
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<tr>
<td>Develop Ongoing Feedback</td>
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<td>--------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Strategy</td>
<td>Specific Action/Time</td>
</tr>
</tbody>
</table>

| Identify Role Models and Coaches | |  |
|----------------------------------|------------------|
| Strategy                         | Specific Action   |

<table>
<thead>
<tr>
<th>Other Learning Tactics</th>
<th></th>
</tr>
</thead>
</table>
Obstacles

What will I give up?

What are obstacles and how will I manage them?
GOAL: Develop oral presentation skills

EXPECTED OUTCOMES:
What will be different? Greater clarity in making myself understood

What will I gain by achieving the goal? Better relationships and more influence

STRATEGIES FOR DEVELOPMENT

Seek New Challenges/Projects

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Specific Action/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take courses that require presentations</td>
<td>Sign-up next week</td>
</tr>
<tr>
<td>Volunteer to do team project presentations</td>
<td>Do it 3 times in core teams this semester</td>
</tr>
</tbody>
</table>

Take Courses and Workshops

<table>
<thead>
<tr>
<th>Course Workshop</th>
<th>Specific Action/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take Angela Noble Granges class in oral presentations</td>
<td>Sign-up for second year</td>
</tr>
</tbody>
</table>

Develop Ongoing Feedback

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Specific Action/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask each of my team mates to observe and ask them for feedback periodically</td>
<td>Arrange a meeting time after each presentation to ask team mates for feedback</td>
</tr>
</tbody>
</table>
## Identify Role Models and Coaches

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Specific Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Doug is good at this – ask him how he prepares</em></td>
<td><em>Arrange a meeting before the end of the month</em></td>
</tr>
</tbody>
</table>

## Other Learning Tactics

*Make sure to ask lots of questions on presentations skills when ever I see someone who is good at it*

*Keep notes or a journal on how I am doing and learning*

## Obstacles

*What will I give up?*

*Some down - time*

*What are obstacles and how will I manage them?*

*Fear of asking teammates to push me and give feedback*
# LEADERSHIP SKILLS AND DERAILERS

## Competencies:

<table>
<thead>
<tr>
<th>Action orientation</th>
<th>Humor</th>
<th>Perspective (sees big picture)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptability</td>
<td>Initiative</td>
<td>Presentation skills</td>
</tr>
<tr>
<td>Approachability</td>
<td>Informing others</td>
<td>Priority setting</td>
</tr>
<tr>
<td>Ambiguity, dealing</td>
<td>Integrity</td>
<td>Self-awareness</td>
</tr>
<tr>
<td>with</td>
<td>Interpersonal savvy</td>
<td>Self-development</td>
</tr>
<tr>
<td>Ambition/drive</td>
<td>Learning on the fly</td>
<td>Self-knowledge</td>
</tr>
<tr>
<td>Caring about others</td>
<td>Listening</td>
<td>Sizing up others</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Courage</td>
<td>Standing alone</td>
</tr>
<tr>
<td>Composure</td>
<td>Managing up</td>
<td>Strategic thinking</td>
</tr>
<tr>
<td>Conflict management</td>
<td>Motivating others</td>
<td>Team building</td>
</tr>
<tr>
<td>Confronting others</td>
<td>Negotiating</td>
<td>Time management</td>
</tr>
<tr>
<td>Creativity/innovation</td>
<td>Organization skills</td>
<td>Trustworthiness</td>
</tr>
<tr>
<td>Decisiveness</td>
<td>Organizational awareness</td>
<td>Understanding others</td>
</tr>
<tr>
<td>Delegation</td>
<td>Patience</td>
<td>Vision</td>
</tr>
<tr>
<td>Developing others</td>
<td>Perseverance</td>
<td>Work/life balance</td>
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<tr>
<td>Ethics</td>
<td>Personal disclosure</td>
<td>Written communication</td>
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<td>Empathy</td>
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<tr>
<td>Fairness</td>
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## Career Derailers

<table>
<thead>
<tr>
<th>Arrogant</th>
<th>Micro-managing</th>
<th>Poor administrator</th>
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</thead>
<tbody>
<tr>
<td>Betrayed trust</td>
<td>Non-strategic</td>
<td>Unethical</td>
</tr>
<tr>
<td>Blames others</td>
<td>Overdependence on an advocate</td>
<td>Unable to adapt</td>
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<tr>
<td>Blocked learner</td>
<td>Overdependence on a skill</td>
<td>Unable to build a team</td>
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<tr>
<td>Defensiveness</td>
<td>Overly ambitious</td>
<td>Unable to staff effectively</td>
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<tr>
<td>Insensitivity</td>
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<tr>
<td>Lack of composure</td>
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FOLLOW-UP

1. Follow through on personal development plan
2. Review progress on developmental plans with coaching teams
3. Resolve a real conflict situation
4. Implement a real change project
5. Draft a personal leadership profile – definition of leadership, mission, vision and values, personal strengths and challenges
6. Rewrite and negotiate your job description to align with personal leadership profile.
YOUR ATTITUDE*

“The longer I live, the more I realize the impact of attitude on life. Attitude to me is more important than facts. It is more important than the past, than education, than money, than circumstances, than failures, than successes, than what other people think or say or do. It is more important than appearance, giftedness or skills. It will make or break a company . . . a church . . . a home . . . a person. The remarkable thing is, we have a choice every day regarding the attitude we will embrace for the day. We cannot change our past . . . We cannot change the fact that people will act in a certain way. We cannot change the inevitable. The only thing we can do is play on the strings we have, and that is our attitude . . . I am convinced that life is 10% what happens to me and 90% how I react to it. And so it is with you . . . we are in charge of our attitudes.”

* Quote from Charles Swindoll