

Overview of Leadership: Parts I & II



AIM Leadership Development Conference
New Orleans
April 23-24, 2015

Introduction to Leadership

Part I – What Effective Leaders Do:
Setting Direction and Creating Culture

Part II – Shaping Leadership Behaviors:
Moving Toward a Personal Leadership
Philosophy

Overview of Leadership: **Part I** – What Effective Leaders Do – Setting Direction and Creating Culture



Peter M. Ginter, Ph.D.

Leadership Theories

Categories	Description
Trait/Great Man Theories	Characteristics/qualities/personalities (leaders are born, not made)
Behavioral Theories	Focus leadership behaviors (roles/tasks) as opposed to characteristics
Contingency Theories	Leadership style is based on the situation variables
Transactional Theories	Exchanges made between the leader and followers (reward/punishment)
Transformational Theories	Relational Trust that gives followers a sense of belonging and identity with the leader

Leadership Theories

Categories	Theories
Trait/Great Man Theories	Great Man, Traits, Heroes
Behavioral Theories	Managerial/leadership Grid, Role, Skills, Katz' s Skills
Contingency Theories	Fiedler' s Contingency, Hersey-Blanchard Situational Leadership, Path-Goal, Vroom-Yetton Decision Making, Cognitive Resource, Strategic Contingency
Transactional Theories	Leader-Member Exchange
Transformational Theories	Burns Transformational Leadership, Bass Transformational Leadership, Kouzes and Posner' s Leadership, Servant Leadership

Management Versus Leadership

So, what's the difference between management and leadership?

Management Versus Leadership

Management	Leadership
<ul style="list-style-type: none"> Plan & Organize Staff & Control 	<ul style="list-style-type: none"> Establish Direction Create a Culture
Creates	Creates
<ul style="list-style-type: none"> Efficiency Order Constancy Consistency 	<ul style="list-style-type: none"> Effectiveness Chaos Change Discontinuity
Requires	Requires
<ul style="list-style-type: none"> Logic Procedures Policies 	<ul style="list-style-type: none"> Creativity Low Risk Environment Tolerance for Failure

Leadership and Management

Leadership	Strong	Excessively Risk Oriented Out of Control	Where We Aspire to Be
	Weak	Impoverished	Excessively Bureaucratic Over Control
		Weak	Strong
		Management	

How Managers Become Leaders

Shift From		Shift To
Specialist	➡	Generalist
Analyst	➡	Integrator
Tactician	➡	Strategist
Bricklayer	➡	Architect
Problem Solver	➡	Agenda Setter
Warrior	➡	Diplomat
Supporting Cast	➡	Lead Role

Michael D. Watkins, HRB, 2012

Leadership Basics

- Leadership is a choice, not a rank.
- Leadership is a behavior, activities; not a trait.
- Behaviors can be learned, improved.
- Leader behaviors are shaped by personal values.
- Values are everyday.
- Values are mostly about relationships.

What Effective Leaders Do

- ☐ Establish Organizational Direction
- ☐ Create Organizational Culture

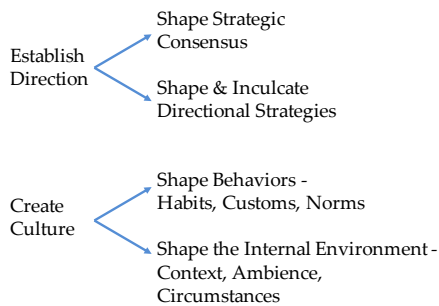
Setting Direction

Understanding the organization's environment and developing and communicating a mission, vision, values, and goals for the future that make the organization as *relevant* as possible.

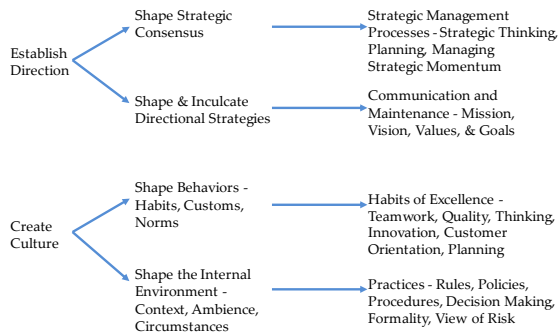
Creating Culture

Shaping the intrinsic habits, customs, and norms of individuals as well as the social, structural, and decision making context of the organization.

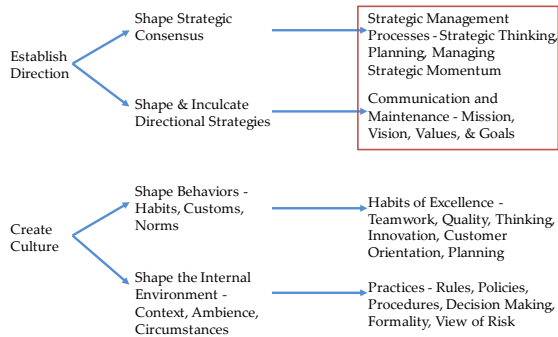
What Effective Leaders Do



What Effective Leaders Do



What Effective Leaders Do



Strategic Management

- Strategic management is a way of thinking – an approach for managing complex organizations
- Strategic thinkers draw upon the past, understand the present, and can envision a better future
- Planners, on the other hand, figure out how to get where the strategic thinkers want to go

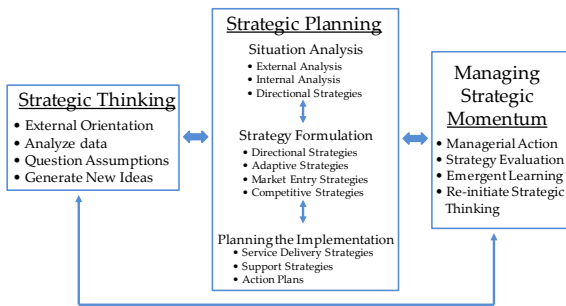
Leading Strategically

- ☐ **Strategic Thinking** – an intellectual orientation, a way of thinking or mindset.
- ☐ **Strategic Planning** – the periodic process of creating organizational momentum (a strategy).
- ☐ **Strategic Management** – a philosophy and process of continuously leading and managing an organization using strategic thinking and periodic strategic planning.

Leading Strategically

Strategic Activity	Description	Orientation/ Scope
Strategic Thinking	Fundamental Strategic Skill - an Intellectual Orientation, a Way of Thinking or Mindset	Individual Leadership Process
Strategic Planning	Process of Creating a Plan Using Strategic Thinking	Periodic Group Leadership and Management Process
Managing Strategic Momentum	Process of Leading and Managing the Strategy using Thinking and Planning	Organizational Management Processes

Strategic Management Processes



Strategic Thinking

Requires a mindset – a way of thinking that:

- Acknowledges the reality of change
- Questions current assumptions and activities
- Builds an understanding of systems
- Envisions possible futures
- Generates new ideas
- Considers fitting the organization to the environment

Strategic Planning

- Provides a sequential, step-by-step process for creating a strategy
- Involves periodic group strategic thinking sessions
- Requires data/information and incorporates consensus and judgment
- Establishes organizational focus
- Facilitates consistent decision making
- Determines what is required to fit with the environment
- Results in a documented strategic plan

Managing Strategic Momentum

- Is the actual work to accomplish objectives
- Concerns decision making and its consequences
- Provides the style and culture
- Evaluates strategy performance
- Is a learning process
- Relies on and initiates new strategic thinking and strategic planning

Directional Strategies

Directional strategies give an organization its identity. It represents “who we are,” “where we are going,” and “how we work.”

Mission, Vision, Values and Goals Communication

Mission = Our current products/services, customers, and philosophy.

Vision = Our hope for the future.

Values = Our expected behaviors, our beliefs and ideas.

Goals = Our “plan” to accomplish our mission & vision.

Mission

An organizational mission is a broadly defined but relatively enduring statement of purpose that distinguishes our organization from others.

Characteristics of a Mission Statement

- Clear and concise
- Concerned with the organization today
- Specific about products/services
- Enduring
- Underscores uniqueness

Strategic Thinking Map for Writing a Mission Statement

Component	Key Words Reflecting Component		
1. Target customers and clients			
2. Principal services delivered			
3. Geographical domain of the services delivered			
4. Specific values			
5. Explicit philosophy			
6. Other important aspects of distinctiveness/image			

Vision

Vision is an expression of hope –a description of what the organization will be like when it is successfully fulfilling its purpose.

Characteristics of Vision

- Inspiring
- Challenging
- About excellence
- Empower employees first and customers second
- Comes alive in the details not in the broad generalities
- Memorable and provides guidance
- Not limited by the present

Strategic Thinking Map for Writing a Vision Statement

Component	Key Words Reflecting Component		
1. Clear Hope for the future			
2. Challenging and about excellence			
3. Inspirational and emotional			
4. Empower employees first			
5. Memorable and provides guidance			

Values

Values are the ideals organizations and people stand for - the fundamental principles that, along with the mission, make an organization unique.

Characteristics of Values

- Reflect the organization's culture
- Consistent with the desired image
- Acceptable to stakeholders
- Consistent with vision
- Ethical
- Represent a clear commitment

Strategic Thinking Map for Writing a Value Statement

Component	Key Words Reflecting Component		
1. Desired behaviors			
2. Organizational norms			
3. Shared beliefs			
4. Share assumptions			
5. Explicit philosophy			
6. Fundamental principles			

Setting Goals

Strategic Criteria for Goals

- Address an external issue, trend, or force
- Concern a stakeholder
- Help achieve a critical success factor
- Draw on a strength or fix a weakness
- Fit with the mission
- Be consistent with the values
- Move the organization toward the vision

Goals Statement Criteria

- Controllable by the organization
- Measureable as possible
- Able to be achieved in a reasonable timeframe
- Have a reasonable level of **stretch** for the organization

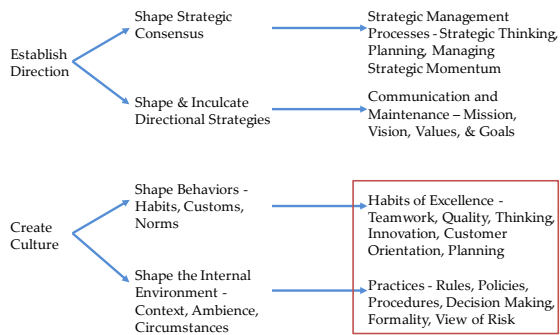
The Process of Momentum Creation

- Setting goals
Organizations, like individuals, that have too many goals lose their focus
"One worthwhile task carried to a successful conclusion is better than half-a-hundred half-finished tasks" – B.C. Forbes (founder Forbes Magazine)
- For most organizations, 4-6 goals are the "sweet spot"
- Three types of goals: *input, process, & output*

What Effective Leaders Do

- Establish Organizational Direction
- Create Organizational Culture

What Effective Leaders Do



Creating Culture

25 Unproven, Somewhat Counter Intuitive, Sometimes Irreverent, Often Overlapping, Occasionally Difficult to Do, Probably Overly Idealistic Principles of Creating an Adaptive Culture (Pretty Much What Leaders Should Do – Most of the Time)

Principle #1

Leadership is about broad strokes rather than narrow strokes!

- Dream and think big – leadership is more about the “big picture.”
- Vision and a future orientation are essential for you and your folks – communicate it.
- Seek effectiveness before efficiency.
- Focus on relevancy and momentum.
- Avoid micro-management – excessive attention to detail will “eat you up.”
- It’s called leadership – management without leadership is called bureaucracy.

Principle #2

In an adaptive culture, less management is generally better than more management!

- Management is control but control is not management (control is the dark side of management – too many managers are won over by the dark side). The nature of management is to focus/control behavior but a light touch is what is needed.
- Develop self-managed teams – ask folks to think.
- Shape the context – develop fewer rules, policies, procedures, rather than more and don’t try to fix everything with a new rule or policy.
- Routines and rules drive out innovation and flexibility (thinking).
- Don’t try to control the small stuff – tracking costs more than it saves.

Principle #3

All solutions are temporary!

- Don’t work so hard for closure to a problem – there is too much change for a solution to last very long.
- One of the lessons of strategic management is that in order to be successful, you must change.
- One problem – “investments in ego.”
- Knowing all solutions are temporary frees you to move on (and not get upset).
- Develop a sense of urgency for innovative solutions.

Principle #4

Simple systems are preferable to complex systems!

- Always strive to simplify.
- Make no system more complex than it has to be.
- Complex systems deteriorate faster than simple systems and need constant (much more) maintenance.
- In complex systems small disruptions can create big disruptions, even systems failure (the butterfly effect).

Principle #5

There is no such thing as change perfection!

- Striving to be too perfect will lead to excessive complexity (see simple systems).
- Eighty percent fast is better than one-hundred percent slowly.
- That last twenty percent to perfection can suck the life out of an initiative/project.
- Objectives, needs, influences, solutions, and systems evolve over time.
- But don't stop improving.

Principle #6

Processes are not ends in themselves but tend to be viewed that way over time!

- People often focus on process elements rather than the objectives of the process (particularly after they've done it for a while).
- Too much focus on the process prevents change/adaptability.
- Process orientation inhibits innovation and, ultimately, survival.
- Be open to changing the process (challenge the current thinking/process).
- Manage the objective(s) not the process(es).
- Eliminate the three stupidest things (processes) we do (at least monthly).

Principle #7

For organization systems, one size does not fit all!

- There are many problems with common (standardized) systems – personnel evaluations, salary ranges, promotion criteria, and so on.
- People find comfort in order/standardization but be careful as too much standardization boxes in people and organizations.
- Standardization inhibits entrepreneurial ventures.
- Centralization/decentralization – customize solutions (when in doubt – decentralize).
- One process/solution cannot deal with diverse applications.
- Be ready to identify the exceptions.

Principle #8

Determine and measure only the critical factors for success!

- And there ain't that many!
- Identify the few important acceptance criteria of customers (internal as well as external).
- Establish precise, accurate, easy to accomplish measurements of these criteria.
- Be careful – point systems can be (will be) gamed.
- Enable those whose judgment, skill and craft determine the outcomes to act upon the measurements.
- Reward behaviors that improve process characteristics to achieve the criteria.
- Manage the measures.

Principle #9

Successful adaption depends on organization culture!

- Organizations are mostly about people and not about things.
- Shape the organization's habits, customs, values, and mores – culture determines what gets done/attention.
- Inspire and motivate "toward" the vision.
- Be the keeper and communicator of the vision.
- Make it interesting and fun.
- Culture follows the money – where you put the resources says a lot about the culture.

Principle #10

Organization systems are not more important
than people!

- Usually what is best for the organization is what is best for the individuals in the organization.
- System (re)design must consider people.
- Make everyone feel safe.
- Pay folks as much as you can.
- People will do what is best for themselves so make it such a great place to work that its hard to leave (make this the greener pasture).
- Make sure everyone learns something.
- Grow everyone in the organization – some may leave, many will stay.

Principle #11

“One-level” leadership helps
eliminate barriers!

- Everyone in an organization should be treated as a peer (equality). Peers can and will share and discuss ideas, opinions, and solutions.
- Folks deserve respect and simple courtesies are important (Be polite and always say “hello”).
- Casual is better than formal – offices as well as dress – formality creates barriers.
- Titles also create barriers, so forget the titles – including Mr., Ms., Dr., V.P.
- Fewer “perks” are better than more “perks.”
- Don’t keep organizational secrets (open information on budgets, finances, productivity and so on) “How can folks throughout the organization make good decisions if they don’t have the information?”
- Generally, keep your door open.

Principle #12

Ownership and productivity go
hand-in-hand!

- Ownership is powerful and eliminates waste.
- Allow budget carryovers.
- You keep what you don’t spend.
- Reward productivity as well as efficiency.

Principle #13

Make management jobs harder and front-line jobs easier!

- Understand that managers and leaders don't actually produce anything.
- Identify and satisfy your internal as well as external customers.
- Subordinates are customers too!
- Constantly seek to identify productivity barriers.
- View your job as that of removing barriers/obstacles, whatever they may be.
- You will not be fully appreciated but your folks will be more productive.

Principle #14

In a changing world, some order is necessary; too much is unproductive!

- Human beings seek constantly to order the world and make sense of our experience. We are always within a framework; where there is no order, we are left with nothing to say.
- Systems poised between order and chaos are at their most creative.
- Strive for enough structure and order to provide direction and define scope but give enough "slack" for learning and innovation to take place.
- Often people will create their own comfortable level of order.

Principle #15

Organize for adaptability/flexibility!

- Most workers expect a formal organization; use these building blocks to create ad hoc structures as needs dictate.
- Job designs should be as broad as possible.
- Small is better than large – yes, size matters – organize into small units (teams).
- Reduce hierarchy – fewer organizational layers.
- Eliminate job descriptions (except: "We do what's needed to get the job done" or "find a way.") And policy manuals as well.
- Ensure that all jobs require thinking (it's easier to just be told what to do).
- Folks may not "get it" at first.

Principle #16

Personal touches are better than
impersonal touches!

- Personal notes are better than formal memos/letters.
- Hand-written notes are better than typed letters.
- Personal contact (face-to-face) is better than email.
- Talk to people and visit them in their space.
- Thank people for (and notice) great work.

Principle #17

Some problems/issues are real some are not
(phantom problems)!

- Much of what we worry about never happens.
- Knowing which problems are real and which are phantom is the key.
- Many problems will go away by themselves because they were never problems.
- Phantom problems develop in direct proportion to the number of stupid rules.
- Tinkering sometimes makes it worse or makes it become a problem.
- There is *always* someone in the organization that believes only you can solve their problem.
- Where possible allow folks to solve their own problems.

Principle #18

Celebrate the victories/accomplishments!

- Create short-term wins, early victories – nothing motivates more than success.
- Processes without early successes can suck the life out of a project.
- Look for a reason to have a party/get together.
- Have some fun – don't worry about "down time."
- Find ways to reward people.

Principle #19

Accountants, IT, and other support functions
work for the organization and not vice-a-versa!

- Make reports/forms work for you, never work for the reports/forms.
- Understand the difference between production and logistics.
- Eliminate “make work” – things that do not add value (and hope that there is something left).
- Make sure everyone know how they create value
- Be a bureaucracy hater/eliminator.
- Don’t make your folks put up with stupid rules, policies, and procedures.

Principle #20

Practice management by wandering around!

- Be personally in touch – wandering, listening, sensing change.
- By the time hard-data-driven information gets to your office is usually a day late and always sterile.
- Reach out to and empathize with the customers, clients, patients.
- Productivity (and relevancy) problems are usually the result of managers who out of touch with their people and customers.
- Yes, there are personal and professional cost to leadership and management.

Principle #21

Consultants can help initiate/implement
change but are not the answer!

- There are no quick fixes.
- Beware of the “canned solution.” I never heard a consultant say, “I don’t know.”
- Consultants have more time to think – but thinking is the key (step back, step forward).
- Find a trusted colleague for periodic “sanity checks.”
- In the end, you have to take responsibility and do it yourself.

Principle #22

Recruiting is always key!

- As with most productive processes, good inputs improve the outputs.
- The extra cost is worth it – go ahead and pay the premium.
- All positions are critical – top to bottom.
- Attitude may be more important than skills, experience, and knowledge.
- Practice the “No Asshole Rule.”

Principle #23

In implementing change, allow (force) folks to “fail forward!”

- Change, creativity, and innovation require some risk taking.
- Press for (encourage) innovation until failure.
- Promote and deliver on life long learning for everyone.
- Never punish for failure with reasonable risks.

Principle #24

It's your job to say “no” as well as “yes!”

- We already have enough “yes-people.”
- Bad ideas are everywhere, even in the boss's office.
- And for trips to Abilene, as well.
- Question assumptions, examine likely outcomes.

Principle #25

Embrace change and find happiness
in what you do!

- Happiness, a good attitude, and optimism are contagious (and so are glumness, a bad attitude, and pessimism).
- A great job wins out over great pay.
- Take a break once in while.
- Have a complete personal life and encourage everyone else to do so as well.
- Sometimes you must think, don't do (stare out the window).
- "Be happy, don't worry!"

25 Unproven, Somewhat Counter
Intuitive, Sometimes Irreverent, Often
Overlapping, Occasionally Difficult to
Do, Probably Overly Idealistic
Principles of Creating Culture (Pretty
Much What Leaders Should Do – Most
of the Time)

Of course, I could be wrong, but I don't think so. And,
Don't let the following be your organizational legacy!

Overview of Leadership:
Part II – Shaping Leadership Behaviors:
Moving Toward a Personal Leadership
Philosophy



Andrew C. Rucks, Ph.D.

Leadership Basics

- Leadership is a choice, not a rank
- Leadership is a behavior, activities; not a trait
- Behaviors can be learned, improved
- Leader behaviors are shaped by personal values
- Values are everyday
- Values are mostly about relationships

Leadership Basics

What Leaders Do

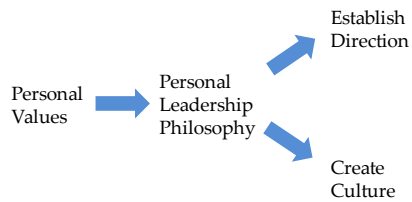
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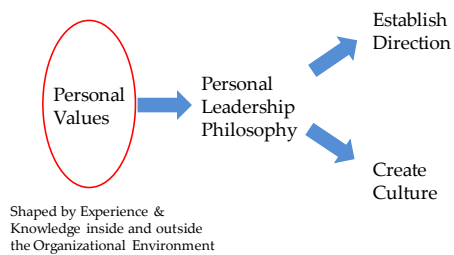
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How Leaders Do What They Do

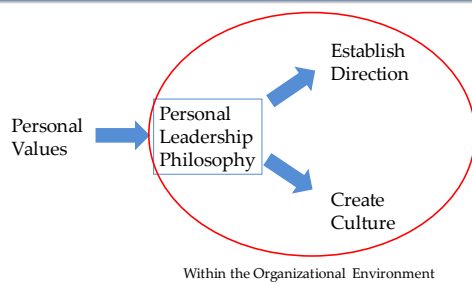
The Role of Values and Leadership Philosophy



The Role of Values and Leadership Philosophy



The Role of Values and Leadership Philosophy



Identifying the Core Values Applicable to Your Organizational Environment

Accomplishment	Correctness	Generosity	Maturity
Acknowledgment	Cunning	Growth	Open-mindedness
Adoration	Decisiveness	Harmony	Optimism
Appreciation	Discipline	Helpfulness	Perceptiveness
Benevolence	Drive	Honesty	Persistence
Bravery	Diversity	Honor	Pragmatism
Calmness	Drive	Humor	Resilience
Capability	Education	Ingenuity	Selflessness
Competency	Effectiveness	Imagination	Stability
Confidence	Equality	Integrity	Teamwork
Cheerfulness	Excellence	Justice	Thankfulness
Collaboration	Fearlessness	Kindness	Trust
Control	Fluency	Knowledge	Trustworthiness
Coolness	Frankness	Logic	Understanding
Structured	Frugality	Loyalty	Wisdom

Group Assignment

- Using the values list and substituting and expanding as needed – identify five values that should influence leadership in your organizational environment.
- Define how each core value will influence leadership in your organizational environment.

My Core Values & Linkages to My Leading

My core values	How I envision each core value influences my leadership
1.	
2.	
3.	
4.	
5.	

Accomplishment	Correctness	Generosity	Maturity
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Building Your Personal Leadership Philosophy

Step 1: Identify My Core Personal Values and Envision How These Values Affect My Leadership.

Step 2: Linking My Core Values to a Positive and Negative Leadership Story.

Step 3: A Draft of My Leadership Philosophy.

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Leading a Multigenerational Workforce AIM Leadership Development Conference

Diane Thielfoldt The Learning Cafe





shifting demographics

Silents are **past** the traditional retirement age of 65.

the labor force of those **65 to 75** is **growing**
at a rate of 80%

Silents are the **most likely** generation
to read a daily newspaper and watch
the news on television.



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shifting demographics

Baby Boomers were the **largest generation** of children born in the US.



The **last** 4.5 million Baby Boomers **turned 50**.

75 million Baby Boomers are redefining consumerism during the "Golden Years."

Boomers @65 AARP

4

shifting demographics

65 % of Gen X is currently employed in full-time jobs.



Gen X is the **emerging management class** in American Companies.

Gen X is firmly in position as the **leader** of American **parenting philosophy**.

5

shifting demographics



The **Millennials** are now officially **the largest and most influential** adult population in American history.

6

shifting demographics

85% Professionals interact with at least 3 other generations at work.

78% People in the US perceive a major divide between the point of view of younger & older people.



Manpower, Generations in the Workplace Study

7

shifting demographics

47% younger employees complained that older managers were resistant to change.

33% older employees found younger workers informality and need for supervision problematic.



Society for Human Resource Professionals

8

shifting demographics

Older workers:

77% say that Millennial workers have a different attitude toward workplace responsibility.

Millennials:

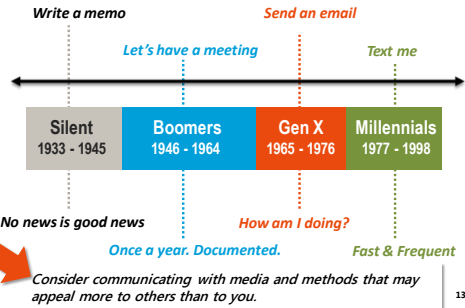
59% agree that their generation has a different attitude toward workplace responsibility.



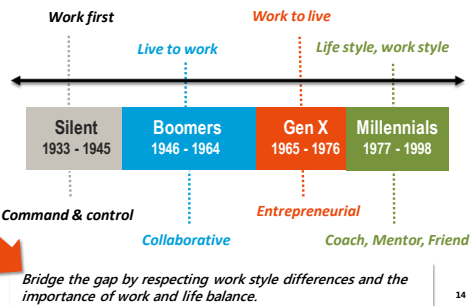
Workplace Options poll

9

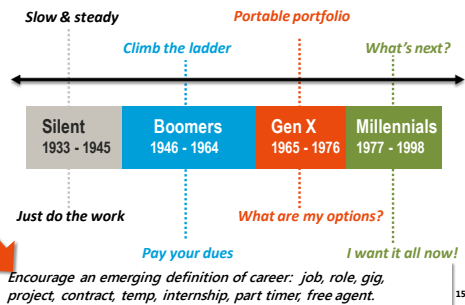
challenges: *communication*



challenges: *climate*



challenges: *career*



influences include

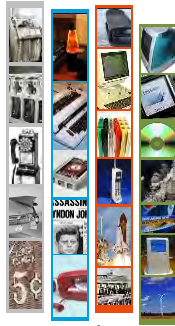
Generation and...

Life Cycle Events

Major / Current Events

Culture

Individual Personality



Generational context is just one very important part of a fully-loaded communication toolbox.

16

S i l e n t s

33 - '45



Came of age with the sacrifice and conformity demanded by the Great Depression and WWII.

17

defined by tastes and times

Conservative
Courteous *defer gratification*
Discipline
Conformist
Make a difference **Sacrifice Loyal**
"We" first - belief in the common good

*"I grew up in the aftermath of the depression. I believe in an honest and hard day's work. And I respect authority."
Mike McConnell, DNI May '07*

1933 - 1945

18

**B
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©2015 The Learning Cafe
1946–'64



Raised amid post WWII prosperity and Cold War threat. Older Boomers strongly affected by Vietnam War.

19

**G
e
n
X**

©2015 The Learning Cafe
1965–'76

defined by tastes and times

Ambitious
hardworking
Optimistic
Forever young
Self Improvement
team players
success is visible
Tolerant
competitive
competitive

Traditional families, social unrest, civil rights, new frontiers; a time of novelty and experimentation, a culture of unlimited possibility.

1946 – 1964

20

**G
e
n
X**

©2015 The Learning Cafe
1965–'76



The first generation to be latch-key kids, they grew up amidst divorce. They witnessed their parents sacrifice greatly for the "firm" only to be laid off.

21



defined by tastes and times

adaptable *Skeptical*
 Self-starters **Resilient**
Life now **Pragmatic**
not later! **independent**
resourceful Self sufficient

Came of age as the economy stagnated, inflation and oil prices soared. In opposition to the hard driving Boomers who live to work, they work to live and view the world with a little cynicism and distrust.

1965 – 1976

22



"Born as an economic slump ended, markets boomed, and communism collapsed. The first Internet generation."

23



defined by tastes and times

confident *Diverse & inclusive*
Informal *Issue-oriented*
Hard working, *Most educated*
high expectations *Coddled,*
 peer-oriented *cocooned,*
Accomplishment *chauffeured*
 & achievement oriented

Brought up during the "empowerment years" where everyone won and no one lost. Raised by parents who nurtured and structured their lives, drawn to their families for safety and security.

1977– 1998

24

generations at a glance

	Events	Traits	Behaviors
Silent	Post Depression Social Security World War II	Defer gratification Disciplined Common Good	Loyal & dedicated Traditional work ethic Willing to reinvent
Boomer	Soaring birthrates New frontiers Social unrest	Change / improvement Competitive Individuality	Build relationships Hard work, badge of honor Driven & sandwiched
Gen X	Single parent home Challenger disaster Corporate layoffs	Independent Skeptical Entrepreneurial	Self-reliant Survivors Priority on family
M's	Child centric time Dangerous world Technology / internet	Confident Informal Technology natives	High expectations Collaborative Accomplishment

25

"I'll have someone from my generation get in touch with someone from your generation."



26

motivators & de-motivators

Silent	Boomer	Gen X	Millennial
✓ Challenge, stimulation, variety ✓ Making a difference Appreciation Autonomy	✓ Challenge, stimulation, variety ✓ Making a difference Appreciation Enjoyable environment	✓ Challenge, stimulation, variety Career growth, learning Work-life balance ✓ Making a difference	✓ Challenge, stimulation, variety Career growth, learning Enjoyable environment Pay
✓ Bad boss Boredom, no challenge Inability to learn, grow ✓ Lack of appreciation	✓ Lack of appreciation ✓ Bad boss Boredom, no challenge Micromanagement	✓ Bad boss Micromanagement No work-life balance	Boredom, no challenge ✓ Lack of appreciation ✓ Bad boss Inability to learn, grow

Discuss: Are you a *good boss*?

27



Silents describe a good boss

- ☐ Shows respect
- ☐ Communicates in person
- ☐ Minds their P&Q's
- ☐ Focuses on work
- ☐ Appreciates my contribution
- ☐ Values my experience & expertise
- ☐ Says what she means and means what she says

28



Boomers describe a good boss

- ☐ Puts work first
- ☐ Builds a relationship
- ☐ Offers challenging work
- ☐ Communicates in person
- ☐ Offers options & flexibility
- ☐ Appreciates my contribution
- ☐ Manages meeting dialogue
- ☐ Introduces me to their network

29



Gen Xers describe a good boss

- ☐ Informal / relaxed
- ☐ Respects work life balance
- ☐ Efficient w/technology
- ☐ Communicates w/candor
- ☐ Gets to the bottom line
- ☐ Holds meetings that matter
- ☐ Encourages networking
- ☐ Offers flexibility & options

30



Millennials describe a good boss

- ☐ Stimulates, stretches, and challenges me
- ☐ Gives me exposure to senior leaders
- ☐ Leverages my networking & social media skills
- ☐ Environment is informal & fun
- ☐ Encourages teamwork
- ☐ Emphasizes collaboration
- ☐ Communicates w/technology
- ☐ Provides structure

31



motivators

Our research shows... **Challenge, stimulation, variety**

Making a difference

Appreciation

Career growth, learning

Autonomy

Enjoyable environment

Work-Life balance

Pay

How motivating are you?

32



 *self-assessment*

- ☒ In the last 30 days, I've acknowledged, recognized or celebrated individual or team accomplishments.
- ☒ I am flexible about work schedules. When a team member needs flexibility, I consider options and I usually find a solution.
- ☒ I delegate tasks to challenge team members and enrich their jobs.
- ☒ Our team's focus on goals is crystal clear; we acknowledge progress often.
- ☒ I encourage team members to talk freely and openly to me about their career aspirations. As a result I know their career goals.
- ☒ I openly communicate to each of my team members their individual strengths and opportunities for improvement. If they could read my mind, they wouldn't be surprised.

33

[illegible]

a **good** boss



1. creates **Climate**

Creates a positive, empowering, flexible work environment. Team atmosphere is a reflection of management tone and priorities.

2. customizes **Communication**

Makes messages meaningful. Small, daily actions add up to a larger communication pattern that either draws people in, or pushes them away.

3. clarifies **Career**

Candid discussions about career aspirations, reputation, and sharing the lessons of experience are vital to engaging employees for the long term.

34

conversations that count

creates **Climate**
energize & empower

customizes **Communication**
messages that matter

clarifies **Career**
coaching counts



conversation

Conversation is the tool that helps people explore ideas and assumptions. The goal of conversation is to deepen understanding, not to debate opinions.

35

1. creates **Climate**

energizes and empowers

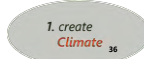
- Walk around, say hello, greet employees
- Keep commitments & appointments
- Find a sense of humor
- Celebrate successes



- Increase camaraderie-building events
- Be open to new ideas and innovation
- Be open to flexible work schedules



Think about: *What can I do to set a work climate that is relaxed, efficient and brings out the best in others?*



36

conversation starters

1. create Climate

create Climate
energize & empower

- What kind of working relationship are you seeking from your manager? Your colleagues?
- What makes a great day at work for you? What are the favorite parts of your job? Less favored?
- How can we best recognize you for your contributions and efforts?
- How well are you able to balance your work with interests and commitments outside of work?

37

2. customize Communication

2. customize Communication
messages that matter

- Connect in person
- Express appreciation
- Tell employees "you count"
- At least once a month "ask"
- 75 – 25 Listen-talk
- Schedule lunch with employees
- Help employees separate what they can control from what they can't



Ask yourself: Does my communication draw employees in or push them away?



38

conversation starters

2. customize Communication

customize Communication
messages that matter

- How do you prefer to receive information?
- How do you use technology to communicate? Do you have a preference?
- How do you learn best? What helps and hinders your learning?
- What kind of feedback and or information do you want to provide me with on a regular basis?
- How are you doing at building relationships with your colleagues? What support can I provide?

39

3. clarify
Career

3. clarify Career

coaching counts

- Clear expectations
- Career conversations
- Career development plan
- Offer career development opportunities
 - Encourage informal mentoring
 - Keep (or start!) giving feedback
 - Help employees build skills in place
 - Discuss reputation



Discuss: 98% of Millennials place high value on coaching, learning and development. How do you measure up?

40

3. clarify
Career

conversation starters

clarify Career

coaching counts

- ❖ What actions are you taking to manage your career? How can I support you?
- ❖ What kinds of work would you like to be more involved with? Less involved with?
- ❖ What skills and capabilities are you interested in developing here? What does career growth mean to you?
- ❖ How much feedback do you require? Desire?
- ❖ What do you need to learn next to meet your goals or leverage your strengths?

41

recruit

"We need your unique contribution; we want you on the team."

"Your experience is welcome; teach us what you know."



"There's a lot of challenge and structure; you won't be bored."

"You can be entrepreneurial and highly skilled here."

42

onboard

Share the pride, the history
and the mission.



Buddy, social network, the
unwritten rules.

*Your experience fits,
introductions to
senior leaders, build
credibility.*

*Describe the fit; the skills
portfolio, expectations &
measures.*

43

coach

Transitions, phased
retirement, mentoring others.



Expect a lot. Give a lot of
feedback. Answer Why?

*Fight skill obsolescence;
lateral moves, skills
updates.*

*Build skills portfolio: job
changes, rotations, swaps,
development. Discuss
reputation.*

44

engage & retain

Appreciate knowledge; create
mentoring roles, teach &
learn.



Challenge, personalize the
work. Create a collegial
climate.

*New challenges
that match & grow
skills. Work life
balance.*

*Flexible hours,
flexible work.
Resist micro-
managing.*

45

thank you!

The future belongs to
those who can learn,
and our greatest
learning asset is other
people.

The Learning Café
thanks you.

Diane Thiel foldt
dthiel foldt@msn.com
843.471.2374



*The things that we share in our world are far more
valuable than those which divide us.*



climate

communication

career

Work first!

Live to Work!

Work to Live!

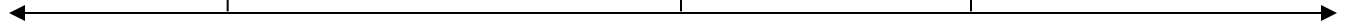
Life Style! Work Style!

Silent
1933 - 1945

Boomer
1946 - 1964

Gen X
1965 - 1976

Millennial
1977 - 1998



shifting demographics

challenges

Silent

Gen X

world events
Heroes Technology
economy
Politics
POP CULTURE

Baby Boomer

Millennial

preferences traits characteristics attitudes outlooks viewpoints qualities

climate



communication



career

motivators & de-motivators

self-assessment

engagement actions

conversations that count

engagement strategy



 **create Climate**

 **customize Communication**

 **clarify Career**

take action!

Gen lens
Gen ?
Leverage
Co-Gen

take it back!

recruit

onboard

coach

engage

retain



Collaborative Leadership to Advance Community Health

AIM Leadership Conference
April 24, 2015

Eric T. Baumgartner, MD, MPH
Senior Community Health Strategist
Louisiana Public Health Institute

Why Leadership? Effective Collaborative Opportunities!

Achieve Together that which you
Could Not Do:

- Alone
- As effectively
- As strategically
- As quickly
- As affordably
- As sustainably

Thoughts on Leadership

- Management and/vs Leadership
- Not what you control or impose, but what you influence
- Self-awareness
- Open to new ideas – give it away to get it back - **better**
 - Truly believe no one of us is as smart as all of us
- Being right or smart about something isn't the final arbiter – it's the shared will of people around the issue
- Expectancy Theory of behavior = valence X agency
- The "Speed of Trust" - in the end, its all people business, its not just achieving programmatic objectives, its very much about the experience of the participants in the success or "failure"

The Four Leadership Styles

from Collaborative Leadership, A Product of Turning Point

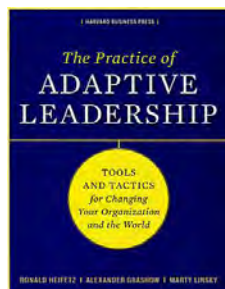
Supportive Behavior ↑	Supporting High supportive & Low directive	Coaching High supportive & High directive
	Delegating Low supportive & Low directive	Directing Low supportive & High directive
	Directive Behavior →	

Leadership

**"People don't care how much you know--
until they know how much you care."**

--John C. Maxwell

Heifetz and Linsky



Ronald A. Heifetz and Marty Linsky, "A Survival Guide for Leaders,"
Harvard Business Review, June 2002, pp. 65-74.

Technical vs. Adaptive* Challenges

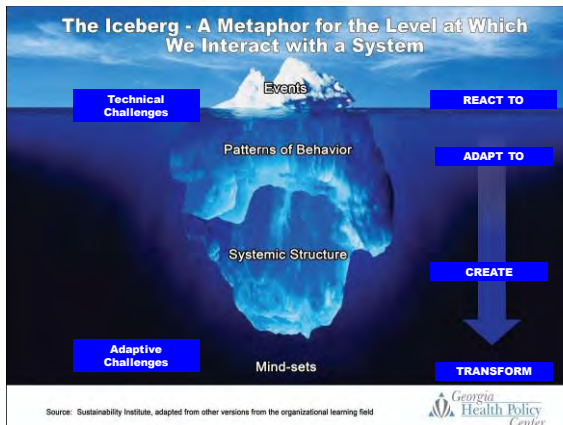
Technical Challenges

- Ready made solution exists
- Someone has *The Answer*
- Standard Operating Procedures (SOPs)
- Even if they require intense skills, some expert knows exactly what to do...
- Examples
 - Building a hospital
 - Fixing a broken computer
 - Brain surgery

Adaptive Challenges

- Never solved issue
- Perhaps new, never seen before
- No one's got *The Answer*
- Must be solved by collaboration
- Examples
 - Poverty
 - Reforming public education
 - Health equity

K Minyard and G. Landers, Georgia Health Policy Center;
Adapted from Ronald A. Heifetz and Marty Linsky, "A Survival Guide for Leaders,"
Harvard Business Review, June 2002, pp. 65-74.



Exercise 1

- In small groups, have one person identify a specific operational challenge you are facing
- As a team, identify two levels of underlying drivers (iceberg) or root causes (upstream) of the challenge.
- What might be a more strategic approach to mitigating the challenge? Where might there be distinction in role/impact of management vs leadership in impacting these influences?

Systems Thinking and Leadership

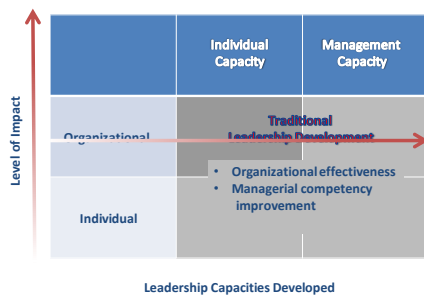
Levels

- within organizational internal teams
- within organizations
- within sectors
- across sectors

Socio-ecologic model of health/health equity

- Broad (esp social) Determinants of Health
- Health in All Policies

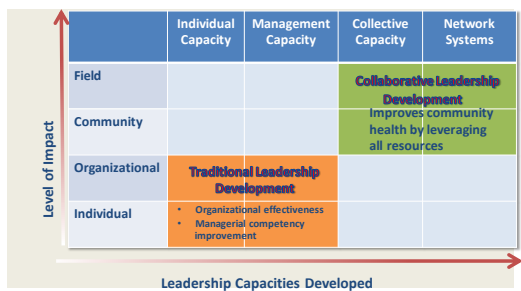
Traditional Leadership Development



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11

Going After Big Results



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CHLP Model for Intersectoral/ (Collaborative) Leadership



Competencies: Personal Mastery

- Understand role as health leader
- Reflective, Self-aware
- Respectful, empathic, patient
- Builds teams
- Adaptable, manages change and conflict, resilient
- Sensing/perceiving, Active listener
- Effective communicator
- Reliable, builds trust (Trust = integrity x reliability)
- Systems/strategic thinker (may be discipline or organizational)

Competencies: Collaborative Leadership Mastery

- Systems thinking (socio-ecological system level)
 - holistic approach to community health
- Ability to work across sectors – build/sustain meaningful partnerships
- Effective continuous communication
- Politically savvy
- Evidenced-based - CQI/cycle of innovation – applies evidence for decision-making/influencing others
- Commitment to health equity principles
 - Social Determinants of Health

Six Conversations That Matter

Peter Block (www.abundantcommunity.com)

- **Invitation** - collaborate by choice not compliance
- **Possibility** - build the future, not fix past
- **Ownership** - share in owning issue/action
- **Dissent**- authentic dissent is a gift – concerns, values
 - commitment begins with doubt
 - Authentic vs inauthentic = form of refusal, such as denial, rebellion and resignation
- **Commitment** – promise to contribute to shared cause
- **Gifts** – acknowledging/capitalize what each has to offer

The Questions - Peter Block

Appreciative Inquiry (AI) -

Cooperrider and Whitney

- Possibility Thinking, Aspirational
 - Appreciate: the *good of what is...*
 - Imagine: *what might be...*
 - Dialogue around *what should be...*
 - Create together: *what will be...*
 - Assume: *organization/community is a mystery to be discovered*
 - The front door to *what we ultimately want*

Exercise 2

- In small groups, have one person offer an actual transaction they foresee needed to be done soon to engage existing or potential partners. With the Six Conversations or AI in mind, build a quick outline of how to effectively prepare for and participate in that transaction to give the best chance of coming to a meaningful shared commitment around a value-added, mutually developed idea.

Building Community Partnerships

What Successful Communities Run On

- Deliberately forego blaming for the past
 - generally plenty of missed opportunities all around

But, deal with it by:

- Fairness in areas of competition
- Seeking areas for cooperation
 - if successful in above, this can work

What Successful Communities Run On

- Leadership
- Cross Sector Inclusion
- Shared vision and goals
- Appeal to both mission and margin
- "Fair and Finite"
- Reciprocal accountability
- Enlightened Self-Interest
- Community/Political Will-building

Garnering Substantive and Lasting Partnerships

- In order to secure partner commitment and to retain over the long run, partners must have continuous evidence of sufficient benefit (mission and/or margin) to continue to collaborate
- Benefit/value may accrue to each partner in different form, in different amount and at different times
- Each partner must believe that within the time horizon, benefit will be sufficient
- Appealing to Good Government and Corporate citizenship

Community Partnering Missed Opportunities

- Any person, organization or sector can be meaningful partner
- Among existing partners, additional areas of collaborative action are possible
- Whenever have something to offer, add a request = leveraging
- Continually, deliberately make the cause, the effort and the achievements evident

Getting to the Next Level

Where communities' relative starting points may vary ...

...every community can identify and realize "the next level" of capacity for health.

It's the level of effective leadership that creates the opportunity and the action.

At the End of the Day....

Through its actions and inactions, a community decides the level of health and well-being of its residents.

It is the level of shared commitment in a community that determines its capacity to accord its people a reasonable prospect for health.

As leaders in my community, we decide to ...

Leadership Resources

Bibliography

- *Six Conversations That Matter: A Quick Review* - Peter Block
 - *The Questions: Five Language Actions that Create Community and Shift the Public Debate* - Peter Block
 - *Appreciative Inquiry Handbook: The First in a Series of AI Workbooks for Leaders of Change* – David Cooperrider and Diana Whitney
 - *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization* - Peter Senge
 - *Boundary Spanning Leadership* – Chris Ernst and Donna Chrobot-Mason in partnership with the Center for Creative Leadership
 - *The Speed of Trust: The One Thing That Changes Everything* – Stephen Covey
- National Health Leadership Academy
- *Center for Health Leadership and Practice, A Center of the Public Health Institute*, Oakland, CA

So What...

- What reconnection to effective personal approaches to leadership has this session prompted?
- What new awareness or sensibility has come to you?
- In what imminent transaction will you apply your leadership competency?
- How will you develop a deeper understanding of the underlying drivers in your organization, sector or community that are impacting achievement of shared goals?
- What might you do after this workshop to continue your leadership evolution?

Thank You

Six Conversations That Matter: A Quick Review by [Peter Block](#)

There is a great deal written and practiced about creating new conversations, all of which is valuable and holds the same spirit as what is outlined here. For example, for some time there has been an important dialogue movement to help people understand their own mental models and listen more deeply as an act of inquiry.

The types of conversations outlined here are a little different in that they are aimed at building community, whereas many of the others are primarily aimed at individual development or improving relationships. Plus these community-building conversations are pointedly designed to confront the issue of accountability and commitment.

These community-building conversations confront the issue of accountability and commitment.

To open the community to an alternative future, start with the invitation conversation. Since all the **other conversations lead to one another, sequence is not all that critical. It's** important to understand that some are more difficult than others, especially in communities where citizens are just beginning to engage with one another. Certain conversations are high-risk and require a greater level of trust among people than others to have meaning. A good meeting design begins with less-demanding ones and ends with the more-difficult ones.

1. **Invitation conversation.** Transformation occurs through choice, not mandate. Invitation is the call to create an alternative future. What is the invitation we can make to support people to participate and own the relationships, tasks, and process that lead to success?
2. **Possibility conversation.** This focuses on what we want our future to be as opposed to problem solving the past. It frees people to innovate, challenge the status quo, break new ground and create new futures that make a difference.
3. **Ownership conversation.** This conversation focuses on whose organization or task is this? It asks: How have I contributed to creating current reality? Confusion, blame and waiting for someone else to change are a defense against ownership and personal power.
4. **Dissent conversation.** This gives people the space to say no. If you can't say no, your yes has no meaning. Give people a chance to express their doubts and reservations, as a way of clarifying their roles, needs and yearnings within the vision and mission. Genuine commitment begins with doubt, and no is an expression of people finding their space and role in the strategy.
5. **Commitment conversation.** This conversation is about making promises to peers about your contribution to the success. It asks: What promise am I willing to make to this enterprise? And, what price am I willing to pay for success? It is a promise for the sake of a larger purpose, not for personal return.
6. **Gifts conversation.** Rather than focus on deficiencies and weaknesses, we focus on the gifts and assets we bring and capitalize on those to make the best and highest contribution. Confront people with their core gifts that can make the difference and change lives.

Other conversations may also be important, but these six are vital to shift to a future where each citizen, each neighbor, each individual chooses to take responsibility and own their role in shaping the future.

The information contained in this handout is from a posting by Peter Block and was adapted from his book: *Community: The Structure of Belonging* (San Francisco: Berrett-Koehler, 2008). The posting can be found at:

http://www.abundantcommunity.com/home/posts/peter_block/parms/1/post/20110705_six_conversations_that_matter_a_quick_review.html

The information is shared here with the expressed permission of Abundant Community (www.abundantcommunity.com), the site that hosted Mr. Block's posting.