Overview of Leadership:
Parts I & II

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

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

<table>
<thead>
<tr>
<th>Categories</th>
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<tbody>
<tr>
<td>Trait/Great Man Theories</td>
<td>Great Man, Traits, Heroes</td>
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<tr>
<td>Behavioral Theories</td>
<td>Managerial/leadership Grid, Role, Skills, Katz’s Skills</td>
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<td>Contingency Theories</td>
<td>Fiedler’s Contingency, Hersey-Blanchard Situational Leadership, Path-Goal, Vroom-Yetton Decision Making, Cognitive Resource, Strategic Contingency</td>
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<tr>
<td>Transactional Theories</td>
<td>Leader-Member Exchange</td>
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<tr>
<td>Transformational Theories</td>
<td>Burns Transformational Leadership, Bass Transformational Leadership, Kouzes and Posner’s Leadership, Servant Leadership</td>
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Management Versus Leadership

So, what’s the difference between management and leadership?
Management Versus Leadership

<table>
<thead>
<tr>
<th>Management</th>
<th>Leadership</th>
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</thead>
<tbody>
<tr>
<td>Plan &amp; Organize</td>
<td>Establish Direction</td>
</tr>
<tr>
<td>Staff &amp; Control</td>
<td>Create a Culture</td>
</tr>
<tr>
<td>Creates</td>
<td>Creates</td>
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<tr>
<td>Efficiency</td>
<td>Effectiveness</td>
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<td>Order</td>
<td>Chaos</td>
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<td>Constancy</td>
<td>Change</td>
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<td>Logic</td>
<td>Creativity</td>
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<tr>
<td>Procedures</td>
<td>Low Risk Environment</td>
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<tr>
<td>Policies</td>
<td>Tolerance for Failure</td>
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Leadership and Management

<table>
<thead>
<tr>
<th>Leadership</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong Excessively Risk Oriented Out of Control</td>
<td>Where We Aspire to Be</td>
</tr>
<tr>
<td>Weak Impoverished</td>
<td>Excessively Bureaucratic Over Control</td>
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</table>

How Managers Become Leaders

<table>
<thead>
<tr>
<th>Shift From</th>
<th>Shift To</th>
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</thead>
<tbody>
<tr>
<td>Specialist</td>
<td>Generalist</td>
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<tr>
<td>Analyst</td>
<td>Integrator</td>
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<tr>
<td>Tactician</td>
<td>Strategist</td>
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<tr>
<td>Bricklayer</td>
<td>Architect</td>
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<tr>
<td>Problem Solver</td>
<td>Agenda Setter</td>
</tr>
<tr>
<td>Warrior</td>
<td>Diplomat</td>
</tr>
<tr>
<td>Supporting Cast</td>
<td>Lead Role</td>
</tr>
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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

Establish Direction
- Shape Strategic Consensus
- Shape & Inculcate Directional Strategies

Create Culture
- Shape Behaviors - Habits, Customs, Norms
- Shape the Internal Environment - Context, Ambience, Circumstances

Strategic Management
- Processes - Strategic Thinking, Planning, Managing
- Strategic Momentum
- Communication and Maintenance - Mission, Vision, Values, & Goals

Habits of Excellence - Teamwork, Quality, Thinking, Innovation, Customer Orientation, Planning
- Practices - Rules, Policies, Procedures, Decision Making, Formality, View of Risk
What Effective Leaders Do

- Establish Direction
- Create Culture

Shape Strategic Consensus
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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

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

Strategic Thinking
- External Orientation
- Analyze data
- Question Assumptions
- Generate New Ideas

Managing Strategic Momentum
- Managerial Action
- Strategy Evaluation
- Emergent Learning
- Re-initiate Strategic Thinking

Planning the Implementation
- Service Delivery Strategies
- Support Strategies
- Action Plans

Situation Analysis
- External Analysis
- Internal Analysis
- Directional Strategies

Strategy Formulation
- Directional Strategies
- Adaptive Strategies
- Market Entry Strategies
- Competitive Strategies

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

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

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<tr>
<td>2. Challenging and about excellence</td>
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<tr>
<td>3. Inspirational and emotional</td>
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</tr>
<tr>
<td>4. Empower employees first</td>
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### 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

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<td>2. Organizational norms</td>
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<tr>
<td>3. Shared beliefs</td>
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<td>4. Share assumptions</td>
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<tr>
<td>5. Explicit philosophy</td>
<td></td>
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<tr>
<td>6. Fundamental principles</td>
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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

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 it's 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 frontline 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

What Leaders Do

- 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

How Leaders Do What They Do
The Role of Values and Leadership Philosophy

Personal Values → Personal Leadership Philosophy

Establish Direction

Create Culture

Shaped by Experience & Knowledge inside and outside the Organizational Environment

Within the Organizational Environment
Identifying the Core Values Applicable to Your Organizational Environment

<table>
<thead>
<tr>
<th>Accomplishment</th>
<th>Correction</th>
<th>Humility</th>
<th>Maturity</th>
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<td>Correctness</td>
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<td>Calmness</td>
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<th>The Core Values</th>
<th>Linkages to My Leading</th>
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<td>Core Values</td>
<td>How I envision each core value influences my leadership</td>
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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

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<th>My core values</th>
<th>How I envision each core value influences my leadership</th>
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Group Reports

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.
Example of a Personal Leadership Philosophy

I believe all people want to do good work. I value collaboration, competence, fairness, honesty, humility, and learning. I lead by example, articulating a clear vision, stating goals, planning, and exercising reasoned judgment.
Leading a Multigenerational Workforce

Diane Thielfoldt The Learning Cafe

AIM Leadership Development Conference

1

meet the 4 generation workforce

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.

shifting demographics

"Each generation has a shared history, common biases, and core beliefs."

Silents
1933 - 1945

Boomers
1946 - 1964

Gen X
1965 - 1976

Millennials
1977 - 1998

Cuspers
1960 - 1968
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

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.

shifting demographics

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

---

**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.

---

**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.
shifting demographics
Younger workers (18 – 34) generally more satisfied with their organizations.

Younger workers (18 – 34) much more likely to be considering an exit.

shifting demographics

The number of text messages sent and received everyday exceeds the population of the planet.

By 2016 there will be 350 million smart phones used for work.

By 2020 there will be 100 billion interconnected devices.

Discuss: What do you find challenging about leading four generations of talent?
challenges: communication

No news is good news
How am I doing?

Once a year. Documented.
Fast & Frequent

Consider communicating with media and methods that may appeal more to others than to you.

challenges: climate

Command & control
Entrepreneurial
Coach, Mentor, Friend

Bridge the gap by respecting work style differences and the importance of work and life balance.

challenges: career

Just do the work
What are my options?

Pay your dues
I want it all now!

Encourage an emerging definition of career: job, role, gig, project, contract, temp, internship, part time, free agent.
*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.

---

**Silents**

1933 – 45

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

---

**defined by tastes and times**

Conservative
Courteous
defer gratification
Discipline
Conformist
Sacrifice
Loyal
Make a difference
“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
Boomers

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

1946 – 1964

defined by tastes and times

Ambitious

hardworking

Optimistic

Self Improvement

Competitive

young

Tolerant

team players

success is visible

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

1965 – 1976

Gen X

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.
defined by tastes and times

1965 – 1976

Skeptical
Adaptable
Resourceful
Self-starters
Independent
Life now not later!

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.

1977 – 1998

Millennials

Confident
Diverse & inclusive
Informal
Most educated
Issue-oriented
Hardworking,
high expectations
peer-oriented
Accomplishment
& achievement oriented

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

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.
### Generations at a Glance

<table>
<thead>
<tr>
<th>Events</th>
<th>Traits</th>
<th>Behaviors</th>
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<tbody>
<tr>
<td>Silent</td>
<td></td>
<td></td>
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<tr>
<td>Social Security</td>
<td>Defer gratification</td>
<td>Loyal &amp; dedicated</td>
</tr>
<tr>
<td>World War II</td>
<td>Disciplined</td>
<td>Traditional work ethic</td>
</tr>
<tr>
<td>Soaring birthrates</td>
<td>Change / improvement</td>
<td>Build relationships</td>
</tr>
<tr>
<td>New frontiers</td>
<td>Competitive</td>
<td>Hard work, badge of honor</td>
</tr>
<tr>
<td>Social unrest</td>
<td>Individuality</td>
<td>Driven &amp; sandwiched</td>
</tr>
<tr>
<td>Single parent home</td>
<td>Independent</td>
<td>Self-Reliant</td>
</tr>
<tr>
<td>Challenger disaster</td>
<td>Skeptical</td>
<td>Survivors</td>
</tr>
<tr>
<td>Corporate layoffs</td>
<td>Entrepreneurial</td>
<td>Priority on family</td>
</tr>
<tr>
<td>Child centric time</td>
<td>Confident</td>
<td>High expectations</td>
</tr>
<tr>
<td>Dangerous world</td>
<td>Informal</td>
<td>Collaborative</td>
</tr>
<tr>
<td>Technology / internet</td>
<td>Technology natives</td>
<td>Accomplishment</td>
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### Motivators & De-motivators

- **Silent**
  - Challenge, stimulation, variety
  - Making a difference
  - Autonomy
  - Appreciation
  - Bad boss
  - Boredom, no challenge
  - Inability to learn, grow
  - Lack of appreciation

- **Boomer**
  - Challenge, stimulation, variety
  - Making a difference
  - Appreciation
  - Enjoyable environment
  - Bad boss
  - Boredom, no challenge
  - Micromanagement

- **Gen X**
  - Challenge, stimulation, variety
  - Making a difference
  - Career growth, learning
  - Work-life balance
  - Bad boss
  - Micromanagement
  - Lack of appreciation
  - No work-life balance
  - Inability to learn, grow

- **Millennial**
  - Challenge, stimulation, variety
  - Making a difference
  - Career growth, learning
  - Enjoyable environment
  - Pay
  - Boredom, no challenge
  - Lack of appreciation
  - Bad boss

### Discuss: Are you a good boss?
**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

**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

**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
**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

**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?**

**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.
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.

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.

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?
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?

1. create Climate energize & empower

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?

3. 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?
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?

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?

recruit
“We need your unique contribution; we want you on the team.”

“You 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.”
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.

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.

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 micromanaging.
thank you!

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

The Learning Café thanks you.

Diane Thiefieldt
dthiefieldt@msn.com
843.471.2374

The things that we share in our world are far more valuable than those which divide us.
Leading a Multigenerational Workforce
AIM Leadership Development Conference

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<tr>
<th>Climate</th>
<th>Communication</th>
<th>Career</th>
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<tr>
<td>Work first!</td>
<td>Live to Work!</td>
<td>Work to Live!</td>
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<tr>
<td>Silent</td>
<td>Boomer</td>
<td>Gen X</td>
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shifting demographics

challenges

Gen X

Silent

Baby Boomer

Millennial

preferences traits characteristics attitudes outlooks viewpoints qualities

“The four generation workforce requires unprecedented flexibility on the part of leaders and organizations.”

The Learning Café
**motivators & de-motivators**

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**self-assessment**

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**engagement actions**

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**conversations that count**

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**engagement strategy**

- create Climate
- customize Communication
- clarify Career

**take action!**

**Gen lens**

- Gen ?
- Leverage
- Co-Gen

**take it back!**

---

**recruit** | **onboard** | **coach** | **engage** | **retain**

---

Diane Thielfoldt
dthielfoldt@msn.com
843.471.2374

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"Each generation imagines itself to be more intelligent than the one that went before it, and wiser than the one that comes after it.”  George Orwell
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/or 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, it’s all people business, it’s not just achieving programmatic objectives, it’s very much about the experience of the participants in the success or “failure”
### The Four Leadership Styles

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<th>Coaching</th>
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<td><strong>Supportive Behavior</strong></td>
<td>High supportive &amp; Low directive</td>
<td>High supportive &amp; High directive</td>
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<tr>
<td><strong>Directive Behavior</strong></td>
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<td>Low supportive &amp; High directive</td>
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### Leadership

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

--John C. Maxwell

### Heifetz and Linsky

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

---

**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?

---

*Minyard and Landers, Georgia Health Policy Center*
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

Going After Big Results
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

- *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
- *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?
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

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