LAMP Leadership 101: Personal Leadership Development
The Catalyst for Leading Within

Course Handouts
# Leadership 101: Personal Leadership Development: The Catalyst for Leading Within

## Day 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30a.m.–8:00a.m.</td>
<td>Registration &amp; Continental Breakfast</td>
</tr>
<tr>
<td>8:00a.m.–8:30a.m.</td>
<td>Welcome and Introduction/Team Activity</td>
</tr>
<tr>
<td>8:30a.m.–9:00a.m.</td>
<td>Embarking on the L-Journey</td>
</tr>
<tr>
<td>9:00a.m.–10:15a.m.</td>
<td>Leadership Lab: Personal Mission and Vision Statements</td>
</tr>
<tr>
<td>10:15a.m.–10:30a.m.</td>
<td>BREAK</td>
</tr>
<tr>
<td>10:30a.m.–12:15p.m.</td>
<td>Foundations of Leadership with Lab</td>
</tr>
<tr>
<td>12:15p.m.–1:15p.m.</td>
<td>LUNCH ON YOUR OWN</td>
</tr>
<tr>
<td>1:15p.m.–2:15p.m.</td>
<td>Diversity of Styles (Personality/Leadership/Generations)</td>
</tr>
<tr>
<td>2:15p.m.–2:45p.m.</td>
<td>Lab: Personality Styles</td>
</tr>
<tr>
<td>2:45p.m.–3:00p.m.</td>
<td>BREAK</td>
</tr>
<tr>
<td>3:00p.m.–3:45p.m.</td>
<td>Energy Management</td>
</tr>
<tr>
<td>3:45p.m.–5:00p.m.</td>
<td>Leadership and Time Management</td>
</tr>
<tr>
<td>5:00p.m.–5:30p.m.</td>
<td>Mentoring: How to Be a Good Mentee</td>
</tr>
<tr>
<td>6:30p.m.</td>
<td>Networking Dinner (OPTIONAL)</td>
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## Day 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
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</thead>
<tbody>
<tr>
<td>7:30a.m.–8:00a.m.</td>
<td>Registration &amp; Continental Breakfast</td>
</tr>
<tr>
<td>8:00a.m.–8:15a.m.</td>
<td>Welcome and Day 1 Re-Cap and Day 2 Introduction</td>
</tr>
<tr>
<td>8:15a.m.–9:45a.m.</td>
<td>Communication and Leadership Lab</td>
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<tr>
<td>9:45a.m.–10:00a.m.</td>
<td>BREAK</td>
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<tr>
<td>10:00a.m.–11:00a.m.</td>
<td>Leadership and Conflict Resolution</td>
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<tr>
<td>11:00a.m.–12:00p.m.</td>
<td>Lab: Cases in Conflict and TKI Analysis</td>
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<tr>
<td>12:00p.m.–1:00p.m.</td>
<td>LUNCH ON YOUR OWN</td>
</tr>
<tr>
<td>1:00p.m.–2:30p.m.</td>
<td>Leadership and Ethics</td>
</tr>
<tr>
<td>2:00p.m.–3:00p.m.</td>
<td>Lab: Case Studies</td>
</tr>
<tr>
<td>3:00p.m.–3:15p.m.</td>
<td>BREAK</td>
</tr>
<tr>
<td>3:15p.m.–4:15p.m.</td>
<td>Self-Assessment and Personal Leadership Development Plan</td>
</tr>
<tr>
<td>4:15p.m.–5:00p.m.</td>
<td>Wrap Up and Discussion</td>
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LEADERSHIP 101

Personal Leadership Development: The Catalyst for Leading Within

Embarking on the “L” Journey

“If you want a creative explosion to take place, if you want the kind of performance that leads to truly exceptional results, you have to be willing to embark on a journey that leads to an alignment between an individual’s personal values and aspirations and the organization’s values and aspirations.”

Joe Jaworski, Center for Creative Leadership
What’s your PASSION?

“If you can’t figure out your purpose, figure out your passion. For your passion will lead you right into your purpose.”

Bishop TD Jakes

Effective Leaders...

• Are self-aware and conscious of how they impact the people within their sphere of influence.
• Must be vulnerable enough to have an authentic connection to others

— Jeannea Spence, leadership coach at indiSPENCEable Coaching

Effective Leaders...

• Charismatic enough to engage others
• Humble enough to realize that true leadership involves being of service to others.

— Jeannea Spence, leadership coach at indiSPENCEable Coaching
“Knowing yourself is the beginning of all wisdom.”
-Aristotle

“To share your weakness is to make yourself vulnerable, to make yourself vulnerable is to show your strength.”
-Cbris Jami, "Diotima, Battery, Electric Personality" (2013)

“Becoming a leader is synonymous with becoming yourself. That simple, that difficult.”
-Warren Bennis
### Characteristics of a Leader

- Empathy
- Flexibility
- Consistency
- Direction
- Honesty
- Trustworthy
- Communication

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"Begin with the end in mind..."

- Stephen Covey

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**Personal Mission:**
focuses on what you want to be and on the values/principles you hold most dear.

- Stephen Covey

**Your Creed:**
What you want to **BE**
What you want to **DO**
Mission Statements

• Define the present state you are in
• Should answer three questions about you
  – What you do
  – Who you do it for
  – How you do it
• Write it succinctly (2-3 sentences)
• Written for a short time frame (1-3 years)
• Should be able to say it without referring to it

Personal Mission Statement

• Helps you have a clear perspective on how what you do contributes to your overall happiness
  – Keeps you engaged
  – Productive
  – Healthy
• Having a clearly defined mission statement helps you when you need to adapt to change or make important decisions
• Use words like “To provide...”, “To lead...”

Developing a Mission Statement (the How)

• What do we do today?
• Who do we do it for?
• What is the benefit of doing it? WHY?
Features of an effective mission statement

• States your purpose and values

• Defines you and your desired goals/performance

• What are your responsibilities?

Examples of Mission Statements

• To be a wise and inspiring teacher to the young future leaders of the world.

• To become an honest politician who actually puts the interest of voters before him/herself.

• To live life completely, honestly, and compassionately, with a healthy dose of realism mixed with the imagination and dreams that all things are possible if one sets their mind to finding an answer.

• To bring love and laughter to all those who come into my presence.

Lab Session – Part 1

Personal Mission Statement
Vision Statements

• Define your optimal desired *future* state
• Provides guidance and inspiration as to what you want to accomplish in the near and long term (3-10+ years)
• Helps you understand what you do everyday and how you do it contributes to accomplishing your long term goals
• Written succinctly in an inspirational manner and easy to read

Personal Vision Statement

• What *You* want to be, do, feel, think, own, associate with, and impact by some date in the future
• Consider the following:
  – Things you enjoy doing
  – What brings you happiness and joy
  – Two of your best moments in the last week
  – Issues or causes you care deeply about
  – Things you do very well
  – Things you would like to stop doing or do much less

Developing a Vision Statement

• Consider when writing it to include several areas of life
  – Physical
  – Intellectual
  – Social
  – Spiritual
  – Emotional
  – Career
Developing a Vision Statement

• **Where** do you want to be going forward?
• **When** do you want to reach that stage?
• **How** do you want to do it?

• Focus on what’s important
• Use words like “To be…”, “My vision is…”

Features of an effective vision statement

• Be clear, not ambiguous
• Describe a bright/positive future
• Be realistic in your aspirations
• Make them achievable
• Align the statement with your company, family and community’s values and culture

Examples of Vision Statement

Striving to be the best clinician in delivering a strong patient experience, provide solid clinical outcomes, and participate in research and education.
Lab Session – Part II

Personal Vision Statement

- Mission = reason for existing; your current state
- Vision = where you are going; your future state
- A clear Vision and Mission can give you a sense of purpose
- Improve decision making with clarity about “big picture”
- Enhance your relationships and understand priorities

Putting it all together

- Can include past successes
- Incorporate your values
- Identify contributions you have made
- Identify goals
- End with your mission statement then your vision statement
Personal Development Plans

• Choose one goal from your Vision Statement
• Write up to 3 steps/objectives that will help you accomplish one key part of your goal
• Write the objectives as skills, knowledge or attitudes to attain—what must you acquire or improve?
• For each objective choose a measure to show you have reached it—how will you know you did it?
• Write some development activities to help get you there—how will you actually gain/build/develop these objectives?
• Identify potential mentors—who will help you with your development?
• Last write a target date

This is a journey to discovering leadership in everything you do. It is a discovery towards self development, growth and paradigm shifts.

Preview of LAMP 101

• Foundations of Leadership
• Diversity of Styles
• Communication
• Mentorship
• Resolving conflict
• Ethics
• 5 practices of Exemplary Leadership
• Path to your Leadership Development Project
Changing Behavior

See “Paradigm Shift”

Behave “Behavioral Shift”

Speak “Language Shift”

“The only way to change is by changing your understanding.”
—Anthony De Mello

A thought to ponder...

“The quest for leadership, therefore, is first an inner quest to discover who you are and what you care about, and it’s through this process of self-examination that you find the awareness needed to lead.”

—Leadership Begins With an Inner Journey, article in Leader to Leader Journal 2011: James M. Kouzes/Barry Z. Posner
LEADERSHIP 101

Personal Leadership Development: The Catalyst for Leading Within

Foundations of Leadership

Emotional Intelligence, Trust and Influence

Objectives

1. Explain the idea of Emotional Intelligence as a core leadership attribute.
2. Clarify the definition of Authentic Leadership
3. Understand the essence of Trust and Credibility
4. Relate the concept of Influence to its role in leadership
### Managers and Leaders...are they different?

<table>
<thead>
<tr>
<th>Manager</th>
<th>Leader</th>
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<tbody>
<tr>
<td>Administers</td>
<td>Innovates</td>
</tr>
<tr>
<td>Maintains</td>
<td>Develops</td>
</tr>
<tr>
<td>Control</td>
<td>Trust</td>
</tr>
<tr>
<td>Short-range view</td>
<td>Long-range perspective</td>
</tr>
<tr>
<td>Asks: how and when</td>
<td>Asks: why and what</td>
</tr>
<tr>
<td>Bottom line</td>
<td>Eye on the horizon</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Manager</th>
<th>Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counting Value</td>
<td>Creating Value</td>
</tr>
<tr>
<td>Circle of Power</td>
<td>Circle of Influence</td>
</tr>
<tr>
<td>Managing Work</td>
<td>Leading People</td>
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</tbody>
</table>
“75% of promotions come from attitude, not competence”

“Titles are granted, but it’s your behavior that wins you respect.”

( Kouzes and Posner, 2007)

Objective 1

Explain the idea of Emotional Intelligence as a core leadership attribute.
Emotional Intelligence

“Emotional intelligence (EI) is the ability to recognize one's own and other people's emotions, to discriminate between different feelings and label them appropriately, and to use emotional information to guide thinking and behavior.”


Emotional Intelligence Today

- Critical foundation for competence in skills which are strong predictors of high performance in the workplace.

- EQ accounts for 67% of the abilities deemed necessary for superior performance in leaders

- EQ matters 2x as much as technical expertise/IQ

Goleman, 1998
Goleman’s Model

Personal Competence  Social Competence

Self Awareness  Social Awareness

Self Management  Relationship Management

**Self-awareness**

- **Emotional self-awareness:** Recognizing one’s emotions and their effects.
- **Accurate self-assessment:** Knowing one’s strengths and limitations.
- **Self-confidence:** Sureness about one’s self-worth and capabilities.

**Self-Management**

- **Self-control:** Managing disruptive emotions and impulses.
- **Trustworthiness:** Maintaining standards of honesty and integrity.
- **Conscientiousness:** Taking responsibility for personal performance.
- **Adaptability:** Flexibility in handling change.
- **Achievement drive:** Striving to improve or meet a standard of excellence.
- **Initiative:** Readiness to act on opportunities.
Social Awareness

- **Empathy**: Sensing others’ feelings and perspective, and taking an active interest in their concerns.
- **Service orientation**: Anticipating, recognizing, and meeting customers’ needs.
- **Organizational awareness**: Reading a group’s emotional currents and power relationships.

Relationship Management

- Developing others
- Influence
- Communication
- Conflict management
- Leadership
- Change catalyst
- Building bonds
- Collaboration and Teamwork

EQ as a core leadership skill: The Tipping Point
“People need to be invested in changing their behavior and developing their EI, or it just doesn’t happen. What this means in practice is that you don’t have even a remote chance of changing someone’s EI unless they want to change.”

-Annie McKee (co-author of Primal Leadership)

Developing Emotional Intelligence

1. Develop a clear vision
2. Assess the current state of your EQ
3. Solicit feedback on your EQ from others
4. Gap analysis and learning plan

Assess YOUR EQ: Pair and Share

- Take 5 min to complete handout.
- Discuss results with partner.
- Identify 1-2 areas with opportunity for growth and discuss practical ways you could work on those specific areas.
OBJECTIVE 2
Clarify the definition of Authentic Leadership

Becoming an ‘Authentic Leader’

“Authentic leaders demonstrate a passion for their purpose, practice their values consistently, and lead with their hearts as well as their heads.”

HBR/“Discovering Your Authentic Leadership”
George, Sims, McLean, Mayer, 2007, p. 130

Know Thyself

Take a look inside

- Know your stories
- Know your strengths
- Know your weaknesses
- Know your values
- Know your passions
Relational Transparency

Balanced Processing

Internalized Moral Perspective

ACCELERATING LEADERSHIP AND INNOVATION

Understand the essence of Trust and Credibility

OBJECTIVE 3

Trust issues affect everyone

“I can’t stand the politics at work!”

“I have to walk on eggshells in my job. If I say what I really think, I’ll get fired or at least made irrelevant.”

“I’m tired of being micromanaged!”

“I work in an organization that’s bogged down with bureaucracy. It takes forever to get anything done. I have to go through three levels of authorization to buy a pencil!”

(The Speed of Trust. Stephen M.R. Covey. Pg. 4)
**Who do you trust?? Pair and share**

**So what is TRUST?**

Trust = Confidence

Distrust = Suspicion

(Stephen M.R. Covey)

**TRUST**

(Kouzes and Posner, 2007)

Trust is at the heart of collaboration.

- **Trust** is the highest form of human motivation. It brings out the very best in people. (Covey, 1989)

- “Without trust you cannot lead.”
  (Kouzes and Posner, 2007, p. 224)
The Trust Equation

Character + Competence = TRUST

TRUST MYTHS

• Trust is soft.
• Trust is slow.
• Trust is built solely on integrity.
• You either have trust or you don’t.
• Trusting people is too risky.

TRUST REALITIES

• Trust is hard and real.
• Trust builds speed.
• Trust is both character and competence.
• Trust can be created and destroyed.
• Not trusting people is a greater risk.

The 5 Waves of Trust

(Sir J. R. Covey)

Societal Trust
Market Trust
Organizational Trust
Relationship Trust
Self Trust
The First Wave: Self-Trust

“To build trust with others, we must first start with ourselves.”

-Stephen M.R. Covey

Credibility is a Foundation of Leadership

Credible: adjective

1. Capable of being believed; believable.
2. Worthy of belief or confidence; trustworthy.

Self Trust: Cores of Credibility
(Covey, Speed of Trust)

Character
1. Integrity
2. Intent
Self Trust: Cores of Credibility
(Covey, Speed of Trust)

Character
1. Integrity
2. Intent

Competence
3. Capabilities
4. Results

Perceptions of Leadership
(Kouzes and Posner)

High Credibility
- Be proud to tell others they’re part of the organization.
- Feel a strong sense of team spirit.
- See their own personal values as consistent with those of the organization.
- Feel attached and committed.
- Have a sense of ownership of the organization.

Low Credibility
- Produce only if they’re watched carefully.
- Be motivated primarily by $$$
- Say good things about the organization publicly but criticize it privately.
- Consider looking for another job if the organization experiences problems.
- Feel unsupported and unappreciated.

The Second Wave: Relationship Trust

- Relationship Trust is all about consistent behavior.
- Behavior based on 13 principles that:
  - grow out of the 4 cores.
  - govern trusting relationships.
  - are actionable.
  - are universal.
13 Behaviors of High-Trust Leaders

1. Talk Straight
2. Demonstrate Respect
3. Create Transparency
4. Right Wrongs
5. Show Loyalty
6. Deliver Results
7. Get Better
8. Confront Reality
9. Clarify Expectations
10. Practice Accountability
11. Listen First
12. Keep Commitments
13. Extend Trust

Relationship Trust

“The Emotional Bank Account”
(Covey, 1989)

- Describes the amount of trust that has been built up in a relationship.
- Relationships: Deposits & Withdrawals

The Third Wave: Organizational Trust

“An enterprise that is at war with itself [misaligned] will not have the strength or focus to survive and thrive in today's competitive environment.”

-John O. Whitney, Columbia Business School
The Fourth Wave: Market Trust

“Smart companies will amass trust assets that can be called upon to protect the brand in tough times. Without these deposits in its Trust Bank, a single breach of trust can devastate a company because you have not track record of trust enhancing behavior to call upon.”

-Ellen Ryan Mardiks, CMO, Golin/Harris

The Fifth Wave: Societal Trust

“The success of big business and the well-being of the world have never been more closely linked. Global issues cannot be removed from the business world because the business has only one world in which to operate. Businesses cannot succeed in societies that fail.”

-Jorma Ollila, Chairman and CEO, Nokia

The Speed of Trust

“Speed happens when people...truly trust each other.”

-Edward Marshall
"It is equally an error to trust all men or no man."
-Latin Proverb

5 Actions of Smart Trust

1. Choose to believe in trust.
2. Start with yourself.
3. Declare your intent and assume positive intent in others.
4. Do what you say you’re going to do.
5. Lead out in extending trust to others.
OBJECTIVE 4
Relate the concept of influence to its role in leadership

“Leadership is the art of getting someone else to do something you want done because he wants to do it.”
Dwight D. Eisenhower

“Trust is the single most important factor in personal and professional relationships. It is the glue that holds people together. And it is the key to becoming a person of influence.”

Circles of Influence and Concern
Covey

- Things over which you have control and influence.
- Things which concern and interest you.
Categories of Control

- **Direct control**
  - problems involving our own behavior
- **Indirect control**
  - problems involving other people’s behavior
- **No control**
  - problems we can do nothing about, such as our past, or situational realities

Circle of Influence/Concern

Adopting a Proactive Focus

Why Does Influence Matter

1. Does your organization have a strict hierarchy?
2. Is it more of a team based model?

How does your answer to this question determine the matter of influence?
5 Types of Influence

1. Asserting
2. Convincing
3. Negotiating
4. Bridging
5. Inspiring

5 Steps to Increase Your Influence

1. Understand your influence style
2. Take stock of your Situation
3. Identify your gaps
4. Develop
5. Practice

Take Stock of the Situation

Assume everyone can help
Understand the Other Person’s Situation
Analyze the Relationship
Prioritize Objectives
Identify what matters

Cohen-Bradford Influence Model
Influence Without Authority, 2005
Short Cuts...Mistakes that limit influence

- Advise before understand
- Attempt to build/rebuild relationships without changing conduct or attitude
- Assume that good example and relationship are sufficient


REFERENCES

Refer to LAMP Resource List

Q & A
LEADERSHIP 101

Personal Leadership Development: The Catalyst for Leading Within

Objective

Understand, recognize and appreciate the diversity of personalities, generations, management and leadership styles.
“Strength lies in differences, not in similarities.” Covey

OBJECTIVE
Understand, recognize and appreciate the diversity of personalities, generations, management and leadership styles.

Styles
Your “natural tendency” does NOT define who you are...just your typical tendency or natural response.

Example:
What is your style under stress?
When faced with conflict; do you tend to go to silence or violence?
**Where is your primary source of energy?**
- From the outer world of activity, and spoken words?
- OR from the inner world of thoughts and emotions?

**How do you prefer to take in information?**
- In the form of facts and details?
- OR in the form of patterns and overviews?

**How do you prefer to make decisions?**
- On the basis of logic and objective considerations?
- OR on the basis of personal values?

**How do you prefer to organize your life?**
- In a structured way, making decisions and knowing where you stand?
- OR in a flexible way, discovering life as you go along?
Source of Energy - E or I?

<table>
<thead>
<tr>
<th>Extroversion</th>
<th>Introversion</th>
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<tbody>
<tr>
<td>Social</td>
<td>Private</td>
</tr>
<tr>
<td>Expressive</td>
<td>Quiet</td>
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<tr>
<td>Many</td>
<td>Few</td>
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<tr>
<td>Broad</td>
<td>Deep</td>
</tr>
<tr>
<td>Interaction</td>
<td>Concentration</td>
</tr>
<tr>
<td>Outward</td>
<td>Inward</td>
</tr>
<tr>
<td>Action before thought</td>
<td>Thought before action</td>
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</tbody>
</table>
Lifestyle- Organized or Flexible?

Perception
(preference for acquiring new information)

Open
Wait
Meander
Inquire
Flexibility
Spontaneity

Judgment
(preference for deciding)

Close
Decide
Structure
Organize
Firmness
Control

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GENERATIONAL CHARACTERISTICS

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The Generations...By the Numbers

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Traditionalist</th>
<th>Baby Boomer</th>
<th>Gen X</th>
<th>Millennial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before 1945</td>
<td>27 million</td>
<td>76 million</td>
<td>60 million</td>
<td>88 million</td>
</tr>
<tr>
<td>1946-1964</td>
<td>71 and older</td>
<td>52-70</td>
<td>38-51</td>
<td>14-37</td>
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</table>
### The Traditionalists

- **How did they grow up?**
  - Great Depression, WW II (Pearl Harbor), Rotary phones, letters, first computer
- **Work Ethic:** Dedicated, committed, punctual, productive, disciplined, “Work is Life”
- **View of Authority:** Respectful, Deferential
- **Leadership by:** Authority, Hierarchy
- **Relationships:** Self-sacrifice
- **Rewards:** job well done; “no news is good news”
- **Loyalty:** Belief in organizations, loyal to employer
- **Preferences:** F2F communication, Recognition with longevity, structure and rules
- **Perspective:** Civic-minded

### The Baby Boomers

- **How did they grow up?**
  - Civil Rights movement, “Woodstock Generation”, Women’s lib, Viet Nam War, Cold War, moon landing, touchtone phones
- **Work Ethic:** Driven, Ambitious, Workaholics, emphasize relationship building, “Live to Work”
- **View of Authority:** Love/Hate
- **Leadership by:** Consensus
- **Relationships:** Personal gratification
- **Rewards:** money/title, recognition, corner office (tangibles), occasional feedback is fine
- **Loyalty:** Belief in organizations, loyal to employer, expects loyalty
- **Preferences:** Meetings, career=identity
- **Perspective:** Achievement-oriented and team-oriented

### Generation X

- **How did they grow up?**
  - “Latchkey Kids”, relative peace, social upheaval (family structure), Watergate, MTV, PCs, technology explosion, cell phones, economic volatility
- **Work Ethic:** Balanced, Entrepreneurial, “Work to Live”
- **View of Authority:** Unimpressed, uninterested, little respect
- **Leadership by:** Competence
- **Relationships:** Reluctance to commit
- **Rewards:** Independence; control over his/her time, regular fast and immediate feedback needed (pampering)
- **Loyalty:** Skeptical, no company loyalty
- **Preferences:** E-mail, Independence, fast pace, new challenges, mentoring, “make it happen”
- **Perspective:** Self-reliant, flexibility, changing jobs is “a must”
The Millennials (and Gen Y)

- How did they grow up?
  - Oklahoma City bombing, 9/11, internet, smartphones, social media, technology explosion, economic prosperity and stability, Helicopter parents, “Entitled Ones or Generation WHY”

- Work Ethic: Ambitious, determined, team-oriented, “Work for Fun”

- View of Authority: Relaxed, polite, civil

- Leadership by: Achievement and pulling together

- Relationships: Loyal, inclusive

- Rewards: Meaningful work, fast, immediate and constant feedback

- Loyalty: Belief in organizations, loyal to employer

- Preferences: communication thru technology, seeks mentors and personal fulfillment, growth and personal development

- Perspective: Civic-minded, idealistic, values instant gratification

The View from Each Generation’s Window

<table>
<thead>
<tr>
<th>World War II</th>
<th>Baby Boomer</th>
<th>Generation X</th>
<th>Millennials</th>
</tr>
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<tbody>
<tr>
<td>Outlook</td>
<td>Practical</td>
<td>Optimistic</td>
<td>Hopeful</td>
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<tr>
<td>Work Ethic</td>
<td>Committed</td>
<td>Ambitious</td>
<td>Determined</td>
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<td>Leadership by</td>
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<td>Competitive</td>
<td>Collaboration</td>
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<tr>
<td>Preferences</td>
<td>Civic-Minded</td>
<td>Team-oriented</td>
<td>Civic-Minded</td>
</tr>
<tr>
<td>Turn-Offs</td>
<td>Variety</td>
<td>Political passions</td>
<td>Optimism, Conformism</td>
</tr>
</tbody>
</table>

Generational Clash Points in the Workplace

<table>
<thead>
<tr>
<th>Clash Point</th>
<th>Traditionalist</th>
<th>Baby Boomer</th>
<th>Gen X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work definition</td>
<td>A place you go</td>
<td>A place you go</td>
<td>Anytime, anywhere</td>
<td>Anytime, anywhere</td>
</tr>
<tr>
<td>Work ethic</td>
<td>Committed</td>
<td>Ambitious</td>
<td>Balanced</td>
<td>Determined</td>
</tr>
<tr>
<td>Work/life goal</td>
<td>What will leave you behind?</td>
<td>Bigger things</td>
<td>Building my skill set</td>
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<td>View of authority</td>
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<td>Changing jobs</td>
<td>“You have to be able to take the hard way you can turn”</td>
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<td>Learning</td>
<td>“I learned it the hard way, you can too”</td>
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<td>Motivates me to stay</td>
<td>I expect it</td>
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</tbody>
</table>

### Continuum of Management Styles

<table>
<thead>
<tr>
<th>Management Style</th>
<th>Features</th>
<th>Trait</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authoritative</td>
<td>Likes to retain control, likes to tell those working under them what to do</td>
<td>Makes complex urgent tasks that need doing quickly. Some may feel there is an element of risk about the work.</td>
</tr>
<tr>
<td></td>
<td>No consultation ; Subordinates are expected to obey instructions</td>
<td>May lead to lack of creativity or resistance if employees feel no input.</td>
</tr>
<tr>
<td>Democratic</td>
<td>As with Authoritative, likes to take much of the responsibility for decision making but with a more open attitude for employees.</td>
<td>Employees may feel valued but frustrated because there is little scope for decision making.</td>
</tr>
<tr>
<td></td>
<td>Encourages participation by employees ; Shares information with team members</td>
<td>Some team commitment, particularly when changes need to be made.</td>
</tr>
<tr>
<td></td>
<td>Provides opportunities for the team to influence decision making</td>
<td>When decision making shows that employees are more likely to buy in/support the decisions.</td>
</tr>
<tr>
<td>laissez-faire</td>
<td>Little or no direction from the manager ; Subordinates are free to make decisions</td>
<td>Useful for highly skilled, trained, expert teams.</td>
</tr>
<tr>
<td></td>
<td>Subordinates are free to make decisions</td>
<td>May lead to chaos without articulated control.</td>
</tr>
</tbody>
</table>

For more information, visit: [the importance of effective management](http://businesscasestudies.co.uk/cmi/the-importance-of-effective-management/management-styles.html#axzz3JWhUcTSv)
Leadership Styles

- **Visionary**: Goal to move people to shared dreams.

  “Visionary leaders articulate where a group is going, but not how to get there, setting people free to innovate, experiment, take calculated risks” —Daniel Goleman

- **Coaching**: focus on developing individuals.

- **Affiliate**: emphasizes teamwork, creating harmony in group.

Leadership Styles

- **Democratic**: draws on people’s knowledge and skills; creates group commitment to goals.

- **Pacesetting**: setting high standards for performance.

- **Commanding**: “Military style” Primarily effective in crisis (risk undercut morale and job satisfaction)


Situational Leadership

<table>
<thead>
<tr>
<th>Leader Behavior</th>
<th>Follower Readiness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participating</td>
<td>High</td>
</tr>
<tr>
<td>Selling</td>
<td>Medium</td>
</tr>
<tr>
<td>Delegating</td>
<td>Low</td>
</tr>
<tr>
<td>Telling</td>
<td>Low</td>
</tr>
</tbody>
</table>

Adapted from the Leadership Grid by Hersey and Blanchard.
### PERSONALITY STYLES REVISITED

**TRUE COLORS:**
Leadership Lab Activity

#### Activity: Personality Profile

Colors “At-a-Glance”

<table>
<thead>
<tr>
<th>ORANGE</th>
<th>GOLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Action Oriented”</td>
<td>“The Organizer”</td>
</tr>
<tr>
<td>“Present Oriented”</td>
<td>“Present Oriented”</td>
</tr>
<tr>
<td>30%-35% of general population</td>
<td>30%-35% of general population</td>
</tr>
<tr>
<td>Even split of men &amp; women</td>
<td>Even split of men &amp; women</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GREEN</th>
<th>BLUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>“The Logical One”</td>
<td>“People Who Need People”</td>
</tr>
<tr>
<td>“Future Oriented”</td>
<td>“Past Oriented”</td>
</tr>
<tr>
<td>8%-10% of general population</td>
<td>10%-15% of general population</td>
</tr>
<tr>
<td>75% men and 25% women</td>
<td>75% women and 25% men</td>
</tr>
</tbody>
</table>
Orange
“Action-Oriented”
• Self-confident
• Accepts challenges
• Makes quick decisions
• Takes charge
• Enjoys problem-solving
• Risk taker
• Good negotiator
• Desires change
• Direct communicator
• Learns by doing
• Performance skills
• Needs freedom to act quickly, results and immediate feedback, independence, hands-on, challenge
• Is courageous
• Values choices
• Is spontaneous

Gold
“The Organizer”
VALUES:
• Cooperation
• Commitment
• Integrity
• Loyalty
• Dependability
• Accountability
• Organization
• Thoroughness
• Well-controlled situations
• Fairness
• Keeps expectations and procedures clear
• Maintains schedules/deadlines
• Is efficient
• Needs security, accuracy, clear rules and procedures
• Needs to belong and be productive
• Values credit for work accomplished
• Likes closure

Blue
“People Who Need People”
• Persuasive
• Team builder/player
• Sincere
• Inspirational
• Creative
• Optimistic
• Values relationships first
• Values emotional and social events
• Sees possibilities in others
• Perceptive in understanding others
• Needs affection and acceptance
• Values freedom of expression, unconditional support, and personal approval
• Is self-searching
• Values self-help
Green
“The Logical One”

• Quality conscious
• Future focused
• Very analytical
• Persistent and thorough
• Conscientious
• Precise
• Investigative
• Inquisitive
• Emotionally self-controlled

VALUES:
• Independence and private time
• Intellectual competence, product and process improvement
• Creative mental challenges and freedom to ask “why”
• Fairness
• Recognition for ideas
• Knowledge and wisdom

True Colors Personality Test

Things that others do that frustrate ORANGES
• Follow rules and laws
• Like same routines
• Adhere to deadlines
• Like paperwork
• Lack adventure
• Operate with too much structure

Things that ORANGES do that frustrate others
• Ignore rules
• Appear undisciplined
• Lack planning
• Are quick tempered
• Think out loud
• Buy on impulse

True Colors Personality Test

Characteristics in others that frustrate GOLDS
• Irresponsibility
• Lack of planning
• Lack of discipline
• Laziness
• High risk taking
• Illegal behavior

Characteristics of GOLDS that frustrate others
• Control freak
• Bossy and controlling
• Workaholic
• Obsessive
• Judgmental
• Plans for everything
**True Colors Personality Test**

**Things that others do that frustrate BLUES**
- Lying
- Violence
- Personal rejection
- Lack of communication
- Lack of close friends
- Use of sarcasm

**Things that BLUES do that frustrate others**
- Lack of planning
- Being passive
- Avoiding conflict
- Suppressing problems
- Being too generous
- Being overly sentimental

**Things that others do that frustrate GREENS**
- Routines
- Small talk
- Plagiarism
- Illogical arguments
- Social functions
- Incompetence

**Things that GREENS do that frustrate others**
- Not being sociable
- Live in the future
- Being too wordy
- Blowing up when criticized
- Not going with the flow
- Being independent

---

**Color Profile Summary**

<table>
<thead>
<tr>
<th>ORANGE</th>
<th>GOLD</th>
<th>GREEN</th>
<th>BLUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esteemed By:</td>
<td>Recognition</td>
<td>Being of service</td>
<td>Insights</td>
</tr>
<tr>
<td>Appreciated For:</td>
<td>Creativity</td>
<td>Accuracy and thoroughness</td>
<td>Their ideas</td>
</tr>
<tr>
<td>Validated By:</td>
<td>Visible results</td>
<td>Appreciation of service</td>
<td>Affirming their wisdom</td>
</tr>
<tr>
<td>At Work They Are:</td>
<td>Flexible</td>
<td>Procedural</td>
<td>Pragmatic</td>
</tr>
<tr>
<td>Their Specialty Is:</td>
<td>Energy</td>
<td>Results</td>
<td>Strategy</td>
</tr>
<tr>
<td>Overall Mood:</td>
<td>Enthusiastic</td>
<td>Concerned</td>
<td>Cool/Calm collected</td>
</tr>
<tr>
<td>Key Character Trait:</td>
<td>Skillfulness</td>
<td>Responsibility</td>
<td>Ingenuity</td>
</tr>
</tbody>
</table>
### Leadership Styles

<table>
<thead>
<tr>
<th>Orange</th>
<th>Gold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expects quick action</td>
<td>Expects punctuality, order, loyalty</td>
</tr>
<tr>
<td>Assumes flexibility</td>
<td>Assumes there is a “right” way to do things</td>
</tr>
<tr>
<td>Works in here and now</td>
<td>Seldom questions tradition</td>
</tr>
<tr>
<td>Flexible approach</td>
<td>Is rules oriented</td>
</tr>
<tr>
<td>Welcomes change</td>
<td>Detailed/thorough approach</td>
</tr>
<tr>
<td>Institutes change quickly</td>
<td>Threatened by change if not proven “right”</td>
</tr>
<tr>
<td>Expects people to “make it fun”</td>
<td>Prolonged time to initiate any change</td>
</tr>
<tr>
<td></td>
<td>Expects people to “play” by their rules</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Green</th>
<th>Blue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expects intelligence and competence</td>
<td>Expects others to express their views</td>
</tr>
<tr>
<td>Assumes task relevancy</td>
<td>Assumes a family spirit</td>
</tr>
<tr>
<td>Seeks ways to improve systems</td>
<td>Works to develop others’ potential</td>
</tr>
<tr>
<td>A visionary</td>
<td>Democratic, unstructured approach</td>
</tr>
<tr>
<td>Analytical approach</td>
<td>Encourages change via human potential</td>
</tr>
<tr>
<td>Encourages change for improvement</td>
<td>Expects people to develop their potential</td>
</tr>
<tr>
<td>Constantly “in-process” of change</td>
<td></td>
</tr>
<tr>
<td>Expects people to follow through</td>
<td></td>
</tr>
</tbody>
</table>

---

### REFERENCES

Refer to LAMP Resource List

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### Q & A
### Generational Workforce Characteristics

<table>
<thead>
<tr>
<th>Traditionalist</th>
<th>Baby Boomer</th>
<th>Gen X</th>
<th>Millennial</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Respectful of Authority</strong></td>
<td>Values individuality</td>
<td>Self-reliant</td>
<td>Image conscious</td>
</tr>
<tr>
<td><strong>Values and Sacrifice</strong></td>
<td>Driven by goals for success</td>
<td>Highly educated</td>
<td>Need for feedback and reinforcement</td>
</tr>
<tr>
<td><strong>Values Accountability</strong></td>
<td>Work ethic = hours worked and monetary rewards</td>
<td>Questioning</td>
<td>Values instant gratification</td>
</tr>
<tr>
<td><strong>Values Practical Experience</strong></td>
<td>Believes in teamwork</td>
<td>Most loyal employees</td>
<td>Idealist</td>
</tr>
<tr>
<td><strong>Work Ethic = Timeliness and Productivity</strong></td>
<td>Emphasizes relationship building</td>
<td>Wants open communication</td>
<td>Team-oriented</td>
</tr>
<tr>
<td><strong>Strong Interpersonal Skills</strong></td>
<td>Expects loyalty from coworkers</td>
<td>Respects production over tenure</td>
<td>Wants open communication</td>
</tr>
<tr>
<td><strong>Promotions and Recognition Come with Job Tenure</strong></td>
<td>Career = identity</td>
<td>Values control of his or her time</td>
<td>Searches for others who will help him or her achieve his or her goals</td>
</tr>
<tr>
<td><strong>Values Academic Credentials</strong></td>
<td>Wants work-life balance</td>
<td>Invests loyalty in a person, not in an organization</td>
<td>Wants job that is personal fulfillment</td>
</tr>
<tr>
<td><strong>Accepts Limited Resources</strong></td>
<td>Risk averse</td>
<td>Searches for ways to shed stress in his or her life</td>
<td></td>
</tr>
<tr>
<td><strong>Loyal to Employer; Expects Loyalty in Return</strong></td>
<td>Racial and ethnic identification less important</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


---

### Generational Workplace Characteristics

<table>
<thead>
<tr>
<th>Item</th>
<th>Silents</th>
<th>Boomers</th>
<th>Generation Xers</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core Values</strong></td>
<td>Work is Life</td>
<td>Live to Work</td>
<td>Work to Live</td>
<td>Work for Fun</td>
</tr>
<tr>
<td></td>
<td>Follow the rule first and then ask why. Be loyal to your organization</td>
<td>Change could be painful but inevitable</td>
<td>Need independence</td>
<td>Confidence and self-esteem; High expectations of companies &amp; managers</td>
</tr>
<tr>
<td></td>
<td>Hardworking, and discipline</td>
<td>Workaholics; Value shaking things up</td>
<td>Entrepreneurial; Make it happen</td>
<td>Multi-tasking; Technology natives</td>
</tr>
<tr>
<td><strong>How did they grow up?</strong></td>
<td>Post depression, First computer, Pearl Harbor, Rotary phones, Letters</td>
<td>Civil rights, Moon landing, Cold war, Touchtone phones</td>
<td>Watergate, MTV, PCs, Fall of Berlin Wall, Cell phones</td>
<td>Oklahoma City bombing, Internet, 9/11, email</td>
</tr>
<tr>
<td><strong>How do they interact?</strong></td>
<td>Wisdom: ask them to share their experiences; Tell them that it is valuable to have them in the team</td>
<td>Mentor, do not micromanage</td>
<td>Lots of challenge and varied assignments, along with a clear direction and instructions</td>
<td></td>
</tr>
<tr>
<td><strong>Communication Style</strong></td>
<td>Face to face or written communication is preferred</td>
<td>Meetings are the preferred way</td>
<td>Email communication</td>
<td>Email/Voice mail</td>
</tr>
<tr>
<td><strong>Feedback/reward</strong></td>
<td>Job well done</td>
<td>Money/Title recognition</td>
<td>Fast/immediate feedback</td>
<td>Fast/immediate feedback</td>
</tr>
</tbody>
</table>

## The View from Each Generation’s Window

<table>
<thead>
<tr>
<th>World War II</th>
<th>Baby Boomers</th>
<th>Generation X</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outlook</strong></td>
<td>Practical</td>
<td>Optimistic</td>
<td>Skeptical</td>
</tr>
<tr>
<td><strong>Work Ethic</strong></td>
<td>Dedicated</td>
<td>Driven</td>
<td>Balanced</td>
</tr>
<tr>
<td><strong>View of Authority</strong></td>
<td>Respectful</td>
<td>Love/Hate</td>
<td>Unimpressed</td>
</tr>
<tr>
<td><strong>Leadership By</strong></td>
<td>Hierarchy</td>
<td>Consensus</td>
<td>Competence</td>
</tr>
<tr>
<td><strong>Relationships</strong></td>
<td>Self-sacrifice</td>
<td>Personal gratification</td>
<td>Reluctance to Commit</td>
</tr>
<tr>
<td><strong>Perspective</strong></td>
<td>Civic-Minded</td>
<td>Team-Oriented</td>
<td>Self-Reliant</td>
</tr>
<tr>
<td><strong>Turn-Offs</strong></td>
<td>Vulgarity</td>
<td>Political incorrectness</td>
<td>Cliches, hype</td>
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<td><strong>Outlook</strong></td>
<td>Practical</td>
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<td>Hopeful</td>
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<td>Constant feedback or else</td>
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<tr>
<td><strong>Changing jobs</strong></td>
<td>Bad</td>
<td>Only to move ahead</td>
<td>A must</td>
<td>Routine expectation</td>
</tr>
<tr>
<td><strong>Learning</strong></td>
<td>“I learned it the hard way; you can too.”</td>
<td>“Train ’em too much and they will leave.”</td>
<td>Motivates me to stay</td>
<td>I expect it.</td>
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LEADERSHIP 101

Personal Leadership Development:
The Catalyst for Leading Within

Energy Management

“Energy, not time, is the fundamental currency of high performance”
Loehr and Schwartz, The Power of Full Engagement

Objectives

1. Understand why energy management matters to your leadership
2. Explore the 4 Principles of Full Engagement
3. Examine burnout and recovery
OBJECTIVE 1
Understand why energy management matters to your leadership

“Great leaders are stewards of organizational energy. They begin by effectively managing their own energy”

Loehr and Schwartz

Leaders must mobilize, focus, invest, channel, renew and expand the energy of others.
(Loehr and Schwartz, 2003, p. 17)
OBJECTIVE 2
Explore the 4 Principles of Full Engagement

Principle 1: Full engagement requires drawing on four, but separate, sources of energy

1. Physical
2. Mental
3. Emotional
4. Spiritual

The Dynamics of Energy (Loehr & Schwartz)

<table>
<thead>
<tr>
<th>High Negative</th>
<th>HIGH Positive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angry</td>
<td>Invigorated</td>
</tr>
<tr>
<td>Fearful</td>
<td>Confident</td>
</tr>
<tr>
<td>Anxious</td>
<td>Challenged</td>
</tr>
<tr>
<td>Defensive</td>
<td>Joyful</td>
</tr>
<tr>
<td>Resentful</td>
<td>Connected</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Low Negative</th>
<th>Low Positive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depressed</td>
<td>Relaxed</td>
</tr>
<tr>
<td>Exhausted</td>
<td>Mellow</td>
</tr>
<tr>
<td>Burned out</td>
<td>Peaceful</td>
</tr>
<tr>
<td>Hopeless</td>
<td>Tranquil</td>
</tr>
<tr>
<td>Defeated</td>
<td>Serene</td>
</tr>
</tbody>
</table>
Principle 2. Balance energy expenditure with intermittent energy renewal

- Energy diminishes with both overuse and underuse
- You will have times of high expenditure
- Ensure there is time for intermittent energy renewal

Principle 3. To build capacity you must push beyond normal limits

- Build capacity for energy
- Systematic approach to training

Principle 4. Highly specific routines for managing energy are the key to full engagement and sustained high performance

What are your habits and rituals that help you?
- When and what are you doing when you are most effective?

What are your habits and rituals that hurt you?
- When and what are you doing when you are least effective?
OBJECTIVE 3
Examine Burnout and Recovery

Burnout

“mental and physical exhaustion you experience when the demands of your work consistently exceed the amount of energy you have available”

Rebecca Knight – HBR, April 2, 2015

Reality vs. Perception

Amount of Work

???
How are you managing your energy now?

The Solution

• Take breaks during the day
• Put away your electronic devices
• Engage in meaningful hobbies

Positive Energy Rituals: Make Room for Recovery

1. Schedule it
2. Double the Break you think you need
3. Enlist others so you can’t back out of recovery time
4. Brainstorm activities that rejuvenate you
5. Break a large goal down into measurable chunks and sprint through each chunk
REFERENCES

Refer to LAMP Resource List

Q & A

---
LEADERSHIP 101

Personal Leadership Development: 
The Catalyst for Leading Within

TIME MANAGEMENT

1 Day =
24 hours
1,440 minutes
86,400 seconds

Objectives

1. Understand Four Quadrants model of time management
2. Examine ways to “manage time”
3. Explore the concept of balance
Objective 1
Understand Four Quadrants model of time management

Good Time Management leads to...

- More productive
- Have increased energy
- Feel less stress
- Able to do what they want
- Get more done
- Relate to others positively
- Feel better about themselves

Covey’s 4 Quadrant Matrix
(7 Habits of Highly Effective People)

<table>
<thead>
<tr>
<th>URGENT</th>
<th>NOT URGENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>II</td>
</tr>
<tr>
<td>Crises</td>
<td>Prevention/Planning</td>
</tr>
<tr>
<td>Pressing Problems</td>
<td>Relationship Building</td>
</tr>
<tr>
<td>Deadline-Driven Projects</td>
<td>Recreation</td>
</tr>
<tr>
<td></td>
<td>New Opportunities</td>
</tr>
<tr>
<td>II</td>
<td>III</td>
</tr>
<tr>
<td>Interruptions</td>
<td>Trivial tasks</td>
</tr>
<tr>
<td>Some phone calls</td>
<td>Some phone calls</td>
</tr>
<tr>
<td>Some email</td>
<td>Some email/internet activities</td>
</tr>
<tr>
<td>Some meetings</td>
<td>Timewasters</td>
</tr>
<tr>
<td>Popular activities</td>
<td></td>
</tr>
</tbody>
</table>
### Results of Quadrant Choices

<table>
<thead>
<tr>
<th>URGENT</th>
<th>NOT URGENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I</strong></td>
<td><strong>II</strong></td>
</tr>
<tr>
<td>Stress</td>
<td>Vision, perspective</td>
</tr>
<tr>
<td>Burnout</td>
<td>Balance</td>
</tr>
<tr>
<td>Crisis Management</td>
<td>Discipline</td>
</tr>
<tr>
<td>Putting out Fires</td>
<td>Few Crises</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NOT IMPORTANT</th>
<th>IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>III</strong></td>
<td><strong>IV</strong></td>
</tr>
<tr>
<td>Short term focus</td>
<td>Total Irresponsibility</td>
</tr>
<tr>
<td>Crisis Management</td>
<td>Fired from Job</td>
</tr>
<tr>
<td>See plans and goals as worthless</td>
<td>Dependent on others or institutions for basics</td>
</tr>
<tr>
<td>Feel out of control</td>
<td></td>
</tr>
</tbody>
</table>

#### How do you spend your time?

<table>
<thead>
<tr>
<th>URGENT</th>
<th>NOT URGENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I</strong></td>
<td><strong>II</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NOT IMPORTANT</th>
<th>IMPORTANT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>III</strong></td>
<td><strong>IV</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### “By failing to prepare, you are preparing to fail”

Benjamin Franklin
Determining what should be in Q2

Sample Pareto Chart

<table>
<thead>
<tr>
<th>Reason</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete documentation</td>
<td>x</td>
</tr>
<tr>
<td>Incorrect CPT code</td>
<td>x</td>
</tr>
<tr>
<td>Delay in submitting claim</td>
<td>x</td>
</tr>
<tr>
<td>Orders didn't match treatment</td>
<td>x</td>
</tr>
<tr>
<td>Exceeded financial cap for therapy</td>
<td>x</td>
</tr>
</tbody>
</table>

Reasons for insurance denials

Objective 2

Examine ways to “manage time”
Managing External Time Wasters

Ten Strategies for Better Time Management

1. Know how you spend your time
2. Set priorities
3. Use a planning tool
4. Get organized
5. Schedule your time appropriately
6. Delegate
7. Stop procrastinating
8. Manage external time wasters
9. Avoid multi-tasking
10. Stay healthy

Objective 3

Examine the concept of balance
What is balance to you?

What results are you looking for?

What are you doing?

What do you want to be doing?

What is important to you?

Ask yourself these questions

– What is important to me?
– What makes my life and work meaningful?
– What influences my decision-making process?
– What aspects of a work environment do I find important and essential?

Things you like to do?

Let’s pull out the worksheet
Time Management

- The Four-Criteria Model for Choosing Actions in the Moment
  - Context
  - Time Available
  - Energy Available
  - Priority

"David Allen, Getting Things Done"

Quiet Rituals of Successful People

- Calm, consistent morning routines
- Eliminate needless busywork
- Do what needs to be done, today
- Mindfully focus on the positive
- Create visual reminders of long term goals
- Journal

http://www.marcandangel.com/2014/07/06/12-quiet-rituals-of-enormously-successful-humans/#more-762

Making Choices...
Strategies to promote balance

• Take time off
• Take a lunch break
• Exercise
• Volunteer
• Learn something new
• Laugh
• Get help

• Be a role model
• Cultivate the next generation
• Promote camaraderie
• Use your resources

REFERENCES

Refer to LAMP Resource List

Lamp
The Institute for Leadership in Physical Therapy

Q & A
LEADERSHIP 101

Personal Leadership Development:
The Catalyst for Leading Within

MENTORING AND HOW TO BE A GOOD MENTEE

“There is no lack of knowledge out there...Just a shortage of asking for help.”
Mark J. Carter

Objectives

1. Understand the definition and role of mentoring.
2. Discuss the objectives in planning the meeting.
3. Discuss the goals of the mentoring relationship.
4. Describe the qualities for being a good mentor.
OBJECTIVE 1
Understand the definition and role of mentoring.

“Mentoring is a two-way street...you get out what you put in.”
Steve Washington, COO Casentric

Mentoring
A process in which an experienced individual helps another person develop his or her goals and skills through a series of time-limited, confidential, one-to-one conversations and other learning activities; long-term career development focus.
Source: Center for Health Leadership and Practice, 2002

Mentorship
• A relationship where one person actively supports the professional growth and development of another person
• A confidential relationship
• Non-judgmental
• It is NOT a supervisory relationship
Mentorship Characteristics

- Outside of manager-employee relationship
- Career/professional development focused
- Personal Relationship
- Crosses job boundaries

Management Mentors Group

Learning-Centered Mentoring Paradigm
(Zachary, 2000)

<table>
<thead>
<tr>
<th>Mentoring Element</th>
<th>Changing Paradigm</th>
<th>Adult Learning Principle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentee Role</td>
<td>From passive receiver to ACTIVE partner</td>
<td>Adults learn best when involved* in own learning.</td>
</tr>
<tr>
<td>Mentor Role</td>
<td>From authority to FACILITATOR</td>
<td>Facilitator creates/maintains supportive climate for learning</td>
</tr>
<tr>
<td>Learning Process</td>
<td>From mentor directed; responsible for mentee's learning to self-directed; mentee responsible for own learning</td>
<td>Adult learners have a need to be self-directing</td>
</tr>
</tbody>
</table>

Learning-Centered Mentoring Paradigm
(Zachary, 2000)

<table>
<thead>
<tr>
<th>Mentoring Element</th>
<th>Changing Paradigm</th>
<th>Adult Learning Principle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentoring relationship</td>
<td>From one mentor = one mentee to multiple mentors, multiple models for mentoring</td>
<td>Life experiences add richness to learning process…</td>
</tr>
<tr>
<td>Setting</td>
<td>From: Face to face to multiple and varied venues/opportunities</td>
<td>Adult learners have an inherent need for immediacy of application.</td>
</tr>
<tr>
<td>Focus</td>
<td>From product oriented – knowledge transfer &amp; acquisition to process oriented – critical reflection &amp; application.</td>
<td>Adults respond best to learning when they are internally motivated to learn.</td>
</tr>
</tbody>
</table>
Benefits of Mentoring

**Mentee**
- Opportunity for growth and learning
- Impartial advice
- Holds you accountable
- Increased self-awareness

For the Mentee
- To provide support
- Help learn about the organization’s culture
- Provide opportunities for involvement and clinical as well as leadership development
- To promote quality clinical skills and professional growth
- To develop confidence
- To improve professional satisfaction
- To assist with overall career development and growth
- To model professionalism

**OBJECTIVE 2**
Discuss the objectives in planning the meeting.
Maximizing the Mentoring Relationship

Meetings

- Catching up on life
- Review notes and discuss change to topics or deliverables from last meeting
- Discuss new or ongoing topics
- Review/refine status of goals
- Quick debrief at end of meeting

Meeting Do’s and Don’ts

<table>
<thead>
<tr>
<th>DO</th>
<th>Don’t</th>
</tr>
</thead>
</table>
| • Meet where you can comfortably open up  
• Come in focused and prepared  
• Have some spare time in case meeting runs long | • Meet where it is too public  
• “wing it”  
• Schedule too tightly or |
Mentees should not...

- Monopolize your mentor’s time
- Expect 24/7 access to mentor
- Show up unprepared for your meeting
- Shrug off deliverables
- Use your mentor just for contacts – network!
- Look at this as a guaranteed career advancement

Being an effective Mentee during the meeting

- Be actively engaged
- Be open to new ideas
- Have good communication skills
- Be an active learner
- Be an active listener
- Be someone who takes initiative
- Be prepared
- Be appreciative
- Know your needs/goals
- Recognizes & defines the relationship boundaries
- Ensures the time commitment
- Have a desire to grow
- Be willing to change
- Be open to feedback
- Adhere to the confidentiality

OBJECTIVE 3

Goals of the mentoring relationship

My Goals
1.
2.
3.
Goals of a Mentoring Relationship

• Accelerate the development of employees
• Transfer knowledge from experienced to less experienced
• Professional development of the mentee for improved skills and retention
• Guided by the goals of the mentee

To have an effective relationship

• Both must be actively engaged and want to be there
• Have mutual goals
• Recognize it has to be voluntary
• Must maintain confidentiality
• Be mutually respectful of each other
• Be honest and open
• Be collaborative
• Have joint accountability
• Identify and encourage each other’s strengths

“Spoon feeding in the long run teaches us nothing but the shape of the spoon”

E.M. Forster

OBJECTIVE 4
Describe the qualities of being a mentor.
A Mentor is a...

- Sponsor
- Role model
- Counselor
- Advisor
- Career guide
- Confidante
- Information source
- Intellectual guide

"A mentor is someone who allows you to see the hope inside yourself."
Oprah Winfrey

Good Mentors are...

- Approachable
- Responsive
- Skilled Listeners
- Ethical
- Open and Honest
- Patient
- Non-Judgmental
- Available
- Observant
- Experienced
- Genuinely interested in helping

Mentors...

- Won’t give all the answers
- But they will ask all the right questions
  - What do you want to learn about this scenario?
  - Where are you struggling?
  - What do you think you can do differently?
- Will provide constructive feedback
LEADERSHIP 101

Personal Leadership Development: The Catalyst for Leading Within

Communication

“Everyone communicates, but few of us connect.”
- John Maxwell

Objectives

1. Understand the importance of communication
2. Define what communication is
3. Examine skills needed for effective communication
4. Review the varying styles of communication
5. Discuss barriers and breakdowns in communication
Objective 1
Understand the Importance of Communication

Leadership

• DEFINITION: (a behavioral) process of influencing others to set or achieve goals

• INVOLVES:
  – Influencing skills
  – Personal interaction
  – Communication

Communication: The Manager’s Job

• Tops the list on surveys describing managerial work

• Up to 80% of manager’s time is spent in some form of communication:
  – Writing
  – Reading
  – Speaking (57% to 89% in oral communication)
  – Listening
Leadership Communication Goals

To change behavior
To get & give information
To get action
To persuade
To ensure understanding

Manager Communication focuses on

- The HOW
- What is expected of a person
- Giving feedback
- Steps of a process
- Assigning tasks
- Giving direction

Leadership Communication focuses on

- The WHY
- Dialogue not monologue
- Inspirational
- Speaks to emotion and aspiration
- Spreading the vision
- Aligning thought
Communication...

When done well
- Save time
- Lift morale
- Calm fear
- Create interest
- Provide information
- Clarify
- Inform

When done poorly
- Bore people
- Confuse them
- Create frustration
- Foster anger
- Build anxiety
- Kill morale
- Waste time

Objective 2
Define what communication is

Communication is a Transfer of Information

[Diagram showing the process of communication with sender, receiver, feedback, encode, decode, and medium]
Objective 3
Examine skills needed for effective communication

Cultural Context
7 Cs of Communication

- Clear
- Concise
- Concrete
- Correct
- Coherent
- Complete
- Courteous

Creating a Dialogue

- Reinforcement
- Questioning
  - Open
  - Closed
- Reflecting and Clarifying
- Summarizing

Active Listening

- Using all of your senses
- Set aside judgment
- Have an open mind
- Showing verbal and non-verbal signs that you are listening
- Providing feedback during the discussion
Method of Communication

7% of message is sent through words, with remaining 93% sent nonverbal expressions

Mehrabian and Wiener 1967

Non-Verbal Communication Can...

- Reinforce what is being spoken
- Convey information about emotional state
- Reinforce or define the relationship
- Regulate the flow of communication
Storytelling as a Form of Communication

- Creates mental image of what is being conveyed
- Can simplify the complex data or other messages
- Evokes emotion and connection
- Makes communication memorable

Objective 4

Review the Styles of Communication
Heffner’s Communication Styles

<table>
<thead>
<tr>
<th>Passive</th>
<th>Assertive</th>
<th>Aggressive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Puts you before others</td>
<td>Stand up for yourself while respecting others</td>
<td>Stand up for yourself while violating other’s rights</td>
</tr>
<tr>
<td>Apologetic/tentative voice</td>
<td>I statements</td>
<td>Loud voice</td>
</tr>
<tr>
<td></td>
<td>Firm voice</td>
<td>You statements</td>
</tr>
<tr>
<td>Stooped posture</td>
<td>Look at you</td>
<td>Staring eyes</td>
</tr>
<tr>
<td></td>
<td>Relaxed posture</td>
<td>Rigid posture</td>
</tr>
</tbody>
</table>

Time to get Active
### True Colors Personality Test

#### Characteristics in others that frustrate GOLDS
- Irresponsibility
- Lack of planning
- Lack of discipline
- Laziness
- High risk taking
- Illegal behavior

#### Characteristics of GOLDS that frustrate others
- Control freak
- Bossy and controlling
- Workaholic
- Obsessive
- Judgmental
- Plans for everything

---

#### True Colors Personality Test

#### Things that others do that frustrate BLUES
- Lying
- Violence
- Personal rejection
- Lack of communication
- Lack of close friends
- Use of sarcasm

#### Things that BLUES do that frustrate others
- Lack of planning
- Being passive
- Avoiding conflict
- Suppressing problems
- Being too generous
- Being overly sentimental

---

#### True Colors Personality Test

#### Things that others do that frustrate ORANGE’s
- Follow rules and laws
- Like same routines
- Adhere to deadlines
- Like paperwork
- Lack adventure
- Operate with too much structure

#### Things that ORANGE’s do that frustrate others
- Ignore rules
- Appear undisciplined
- Lack planning
- Are quick tempered
- Think out loud
- Buy on impulse
True Colors Personality Test

<table>
<thead>
<tr>
<th>Things that others do that frustrate GREENs</th>
<th>Things that GREENs do that frustrate others</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Routines</td>
<td>• Not being sociable</td>
</tr>
<tr>
<td>• Small talk</td>
<td>• Live in the future</td>
</tr>
<tr>
<td>• Plagiarism</td>
<td>• Being too wordy</td>
</tr>
<tr>
<td>• Illogical arguments</td>
<td>• Blowing up when criticized</td>
</tr>
<tr>
<td>• Social functions</td>
<td>• Not going with the flow</td>
</tr>
<tr>
<td>• Incompetence</td>
<td>• Being independent</td>
</tr>
</tbody>
</table>

http://www.online-distance-learning.com/article_info.php/articles_id/24

Things that others do that frustrate GREENs

- Routines
- Small talk
- Plagiarism
- Illogical arguments
- Social functions
- Incompetence

Things that GREENs do that frustrate others

- Not being sociable
- Live in the future
- Being too wordy
- Blowing up when criticized
- Not going with the flow
- Being independent

“No one would talk much in society if they knew how often they misunderstood others.”

Johann Wolfgang von Goethe

Objective 5

Discuss barriers and breakdowns in communication

What are the barriers to communication that you have experienced?
### Semantic Barriers
- Misunderstanding the feeling of the sender
- Receiver uses their frame of reference which can create confusion

### Language Related Barriers
- Technical Jargon
- Imprecise word choices
- Words with multiple meanings
- Unclarified assumptions
- Body Language/Gestures
- Accent

### Psychological/Emotional Barriers
- Emotional state
- Lack of time
- Distractions
- Status of communicator
- Defensiveness
- Communication overload
Organizational Barriers

• Physical
• Policies and Procedures on communication
• Complexity
• Status

Mental Models (MMs)

• Categorize cues
• Make sense of the world
• Anticipate consequences
• Determine courses of action
Characteristics of Mental Models

• are incomplete and constantly evolving
• are usually not accurate representations
• typically contain errors and contradictions
• provide simplified explanations of complex phenomena

Dysfunctional Mental Models

• Stereotypes
• Polarization
• Personal agenda
• Generalizations
• Assumptions
• Faulty perceptions

WHEN COMMUNICATION BREAKS DOWN....
Communication Process (revisited)

---

So how is your communication?

<table>
<thead>
<tr>
<th>Informal</th>
<th>Formal</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Rounding</td>
<td>• 360 Survey (free at brand360survey.com)</td>
</tr>
<tr>
<td>• Ask Questions</td>
<td>• Survey Monkey</td>
</tr>
<tr>
<td>– “How am I doing?”</td>
<td>• Performance Review</td>
</tr>
<tr>
<td>– “How would you rate my ability to...”</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Engage</td>
</tr>
<tr>
<td></td>
<td>– Build relationships</td>
</tr>
<tr>
<td></td>
<td>– Listen</td>
</tr>
<tr>
<td>• Listen and observe</td>
<td></td>
</tr>
</tbody>
</table>

---

Thought to ponder

90 percent of personal and professional success is directly attributable to how well we communicate.
REFERENCES

Refer to LAMP Resource List

Q & A

ACCELERATING LEADERSHIP AND INNOVATION
Objectives

1. Identify various definitions of conflict
2. Understand the different levels of conflict
3. Appreciate diversity of styles in conflict management
4. Explore the role of vulnerability in conflict
5. Understand interpersonal communication skills in times of conflict
OBJECTIVE 1
Identify various definitions of conflict

Definitions of Conflict

- Tension or a disagreement between 2 or more parties.

- “A process in which one party perceives that its interests are being opposed or negatively impacted by another party.” (Wall & Callister, 1995, p. 517)

Definitions of Conflict

“An expressed struggle between at least two interdependent parties, who perceive incompatible goals, scarce rewards and interference from the other party in achieving their goals.”

Joyce Hocker and William Wilmot
CONFLICT HAPPENS!

Conflict is...

INEVITABLE due to differences among all parties:

- Background
- Culture
- Education
- Beliefs and values
- GOALS

Conflict is...

...not necessarily ‘good’ or ‘bad’ – but most always uncomfortable!
How we respond to conflict is most important.

The ‘best’ response is variable…
(more later)

“Peace is not the absence of conflict but the presence of creative alternatives for responding to conflict -- alternatives to passive or aggressive responses, alternatives to violence.”
-Dorothy Thompson

OBJECTIVE 2
Understanding levels of conflict
Levels of Conflict

- **Personal Conflict**
  Inter-role conflict within individual

- **Interpersonal Conflict**
  Conflict between individuals

- **Intra-group Conflict**
  Members of group disagree on action

- **Inter-group Conflict**
  Conflict between two or more groups of people, departments, or organizations

Sources of Conflict

- **Psychological elements:**
  Trust, respect, desire for inclusion (personal, interpersonal level)

- **Procedural elements:**
  Policies, chain of command, decision-making authority (intra-group level)

- **Life circumstances**
  Illness, disability, death (personal level)

- **Lack of communication**
  (EVERY level)

**OBJECTIVE 3**

Appreciating diverse styles of conflict management
Conflict Management Styles

Thomas-Kilmann Conflict Mode Instrument – TKI

One Model to Consider...

LEVEL OF ASSERTIVENESS
LEAST           MOST

LEVEL OF COOPERATION
LEAST           MOST

ACCOMMODATION  COMPROMISE

COMPETITION

5 Conflict Management Styles

• Avoidance
• Accommodation
• Collaboration
• Competition
• Compromise
Avoidance

• Unassertive and uncooperative
• Passive-aggressive
• Often prolongs issue
• Times when useful & appropriate

Accommodation

• Unassertive, yet cooperative
• Approval seeking
• May be temporary
• Often leads to anger or frustration
• Appropriate when the other party is right, or there is no chance of winning

Collaboration

• Involves both cooperation and assertiveness
• ALL parties want to fully address the needs of EVERYONE
**Competition**

- Aggressive
- Uncompromising
- Used by ‘aggressive’ personalities
- “I win, you lose” attitude

**Compromise**

- Strategy midway between competition & accommodation
- Also involves assertiveness AND cooperation
- ‘Give & take’ strategy
- *Neither party gets all of what they want*

---

**Level of Assertiveness**

<table>
<thead>
<tr>
<th>Level of Assertiveness</th>
<th>Least</th>
<th>Most</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of Cooperation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Least</td>
<td></td>
<td></td>
</tr>
<tr>
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<tr>
<td>Compromise</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoidance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Competition</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

97
What is your style? (Score your TKI)

• Discuss your results with your partner.
• Were results as you expected? Or not?
• What do YOU think influences or determines conflict styles?
• Describe ONE incident of conflict where your style was evident (at least to you!)

So far you have learned...

• Definitions of conflict

• Levels of Conflict

• Sources of Conflict

• Conflict Management Styles

“Most people believe vulnerability is weakness. But really vulnerability is courage.”
Brene Brown

OBJECTIVE 4
Explore the role of vulnerability in conflict
Vulnerability: Weakness or Courage?

- Does not mean being weak
- Implies you have courage in yourself
  - Involves uncertainty, risk and emotional exposure
  - Willing to be seen
  - It is an inevitable part of relationships

Vulnerability

- How we feel
- Our fears
- Our needs

Being honest about...

Shame

- Secrecy
- Silence
- Judgment
- Fear of disconnection/being

- Authenticity
- Tell the story of who you are
- Courage to be imperfect
Showing Up and Being Seen

“this is too much work” often means that we are more willing to live with disappointment instead of being vulnerable.

OBJECTIVE 5
Understand interpersonal communication skills in times of conflict

Our View of Conflict Today

• It is inevitable
• It develops because we are dealing with people – lives, self-concept, ego
• It can be recognized
• We need strategies to resolve it
• The skills and strategies to improve our ability to manage conflict are learnable
During conflict, assume YOU are the one who needs to make a change.
Be proactive-start with you!

Interpersonal Communication Skills

- **Focus on what you want** for yourself and others
- **Learn to look** when conversations become “crucial”
- **Make it safe** for others to participate in conversation
- **Separate fact from story**- recognize your story
- **State your case** objectively and ask for other’s input


Focus on what you really want

- Be aware of your own emotions and behaviors
- Becoming silent or violent? Think about your motives. Are your behaviors related to your motives?
- What do you really want for yourself?
- for the relationship?
- Figure this out and then ask yourself,

“How would I behave if that is what I truly wanted?”

Patterson, Grenny, McMillan, Switzler, 2012
Watch, Look and Listen

- Watch for the moment the conversation starts escalating or turning “crucial.”
- Look for signs that others don’t feel safe in the conversation (becoming silent or violent)
- Pay attention to your own behavior and know your tendencies when under stress

Active Listening

"to listen"

Master Your Stories

“Path To Action”
Master Your Stories

FIRST think—
• How am I behaving?
• What emotions are making me act this way?
• What story is behind my emotions?
• What evidence do I have to support my story? (get back to the facts)

ASK yourself:
• “What am I pretending not to notice about my role in the problem?”
• “Why would a reasonable, rationale, and decent person do this?”
• “What do I really want for myself and others?”
• “What would I do right now if I really wanted these results?”

S.T.A.T.E. Your Case

<table>
<thead>
<tr>
<th>WHAT skills</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Share your facts</td>
<td>“I’ve noticed that…”</td>
</tr>
<tr>
<td>Tell your story</td>
<td>“When that happens, it makes me wonder if…”</td>
</tr>
<tr>
<td>Ask for other’s story, facts, and feelings</td>
<td>“How do you see it?”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOW skills</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Talk tentatively</td>
<td>“It seems to me…” or “It makes me think…”</td>
</tr>
<tr>
<td>Encourage testing</td>
<td>“If you see it differently, I’d really like to know.”</td>
</tr>
</tbody>
</table>
S.T.A.T.E.ing Your Case

- Use “I” statements when stating your case
- Describe your own needs, values and feelings openly, honestly and directly
- Claim ownership of your feelings, express your needs and describe the situation objectively instead of evaluating it

Patterson, Grenny, McMillan, Switzler, 2012

S.T.A.T.E.ing Your Case

When stating your case, use I and me statements.

Say this:

“When you show up late or miss meetings, I worry that you don’t think this project is important.”

Rather than:

“Clearly, YOU don’t think this project is important.”

Practicing your skills

Pair-N-Share

5 minutes

Using your conflict scenario, write down exactly what you will say to initiate the conversation (use STATE skills)

10 min (5 min Partner 1 and 5 min Partner 2)

1. Partner 1 describes their scenario to Partner 2
2. Partner 1 initiates the dialogue they just scripted with Partner 2 as if they are speaking to the person they need to have the conversation with.
3. Partner 2 reacts accordingly and gives feedback.
4. Reverse roles and repeat steps 1-4.
How did you do? Easy? Difficult?
Maybe you need a few more skills in your toolkit...

Communication is the art of preparing people to receive information before you say it.

Communication is the art of preparing people to receive information before you say it.

Interpersonal Communication

Communication is the art of preparing people to receive information before you say it.

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Communication is the art of preparing people to receive information before you say it.

Tools to Make It Safe

• For others when you provide them feedback
• For others to provide you feedback

<table>
<thead>
<tr>
<th>What is at risk?</th>
<th>Clear Problem</th>
<th>Misunderstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mutual Respect</td>
<td>Apologize</td>
<td>Contrast</td>
</tr>
<tr>
<td>Mutual Purpose</td>
<td>Create Mutual Purpose</td>
<td>Contrast</td>
</tr>
</tbody>
</table>
Apologizing

- When respect has been violated, apologize.
- Not a sign of weakness.
- Don’t have to apologize for the whole problem, just for your piece of it.

“I’m so sorry I marched in here and raised my voice like that. That is not how I wanted to start this conversation.”

Apologizing

- Be SINCERE.
- Don’t give a “non” apology.

“I’m sorry YOU didn’t understand me.”

or

“I’m sorry you’re so sensitive. If I had known you were going to cry, I wouldn’t have brought this up to begin with.”

Contrasting

- Clarify a misunderstanding to rebuild safety
- Explain what you do NOT intend; address misunderstanding
  “I don’t want you to think I don’t care about what you have to say.”

- Explain what you DO intend; clarify your intentions
  “I do need to focus on getting my work done and I don’t have time to talk right now.”

Patterson, Grenny, McMillan, Switzler, 2012
Creating Mutual Purpose

When it’s clear each party has different purposes:
• Step out of the conversation and commit to seeking a mutual purpose.
• Recognize the purpose behind the strategy.
• Invent a mutual purpose.
• Then brainstorm new strategies.

Patterson, Grenny, McKean, Switzler, 2012

Assertive Communication

3 STEPS:
1. Describe the situation or idea clearly
2. Express how you feel about the situation
3. Specify what you want

Confrontive Assertions

Confrontive assertion elements:
1) When you... (behavioral description)
2) I feel... (feeling word)
3) Because... (effect it has on my life)
Problems with Confrontive Assertions

- Tend to place blame on people.
- Can be accusatory and demeaning to other person
- Tend to be counter-productive because increases entrenchment in position

Productive Assertions

- Substitute words and phrases to show concern for how one person’s actions affect others.
- Move people toward mutual interests and away from individual positions.

<table>
<thead>
<tr>
<th>Confrontive Assertion</th>
<th>Productive Assertion</th>
</tr>
</thead>
<tbody>
<tr>
<td>“You are so irresponsible allowing your committee expenses to exceed budget! You are simply spending without any consideration for consequences.”</td>
<td>“I get anxious when I see that your committee expenses are about to exceed our budget and I’m puzzled when I don’t see any corrective action being taken.”</td>
</tr>
</tbody>
</table>

Next Step: Move to Action

Make sure you have a complete and clear plan that you both agree to:

- Who (responsibility, who will do what)
- What (action, what will they do)
- When (time line, when will they do it by)
- Follow-up (how, what is expected)
Using your conflict scenario, think about what other skills you just learned that might be helpful. Write down how you might approach the conversation differently.

- Practice your scenario again with your partner using one of the new tools based on how the conversation went the first time (contrasting, apologizing, finding a mutual purpose)
- Allow each partner time to practice and give feedback

“The truth is that our finest moments are most likely to occur when we are feeling deeply uncomfortable, unhappy, or unfulfilled.

For it is only in such moments, propelled by our discomfort, that we are likely to step out of our ruts and start searching for different ways or truer answers.”

-M. Scott Peck

Reflection

What will you take away from today and put into practice at work (or home)?

<table>
<thead>
<tr>
<th>One new thought:</th>
<th>One new behavior:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One good idea:</th>
<th>Other??</th>
</tr>
</thead>
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</table>
LEADERSHIP 101

Personal Leadership Development: The Catalyst for Leading Within

Leadership and Ethics

“Ethics is knowing the difference between what you have a right to do and what is right to do.”
-Potter Stewart, Supreme Court Justice

Objectives

1. Overview of Ethics
2. Understand the RIPS models to assess moral and ethical dilemmas
3. Review Importance of Core Values and Ethics – personally and professionally
4. Combine your values and ethical practice in assessing Ethical Dilemmas
OBJECTIVE 1
Overview of Ethics

Leadership Ethics in Healthcare

Core Values

Code of Ethics

Bioethics

Ethics Defined

A systematic approach to answer questions of “right” vs. “wrong”

- values and principles
- standards of conduct

How individuals conduct themselves in personal and professional endeavors
- derived from customs
- grounded in moral theory

A philosophical study of what is right and wrong in human behavior and conduct
Ethics/Values/Laws

- Ethics:
  - Rational Reflection
  - 2 competing realms or 2 or more possible courses of action
- Values:
  - Subjective Standards for right/wrong; good/bad
  - Derived from personal, professional, organizational, societal and cultural sources
  - Foundational to Ethical Decision Making
- Laws:
  - Local, State or National
  - Includes rules, administrative codes and regulations

Law and Ethics

- Related and Overlapping Concepts
- Law is minimum standard that represents a consensus on standards of behavior
- Ethics- what is “right” – goes beyond minimal standard of law toward “ideal behavior”

Relationship of Ethics and Law
Why is it important for us to learn & understand?

- We need to assume responsibility for those we care for (autonomous practice)
- Increase our commitment to providing the best in clinical decisions
- Take accountability for our behaviors
  - Human Error
  - At-Risk Behavior
  - Reckless Behavior

Understand the RIPS model to assess moral and ethical dilemmas

“Three Realms of Ethics” - Jack Glaser

Objective 2

RIPS Framework

<table>
<thead>
<tr>
<th>REALMS</th>
<th>Individual Process</th>
<th>Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Ethical Sensitivity</td>
<td>Issue/Problem</td>
</tr>
<tr>
<td>Organizational</td>
<td>Ethical Judgment</td>
<td>Dilemma</td>
</tr>
<tr>
<td>Society</td>
<td>Ethical Courage</td>
<td>Distress</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Temptation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Silence</td>
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</table>
The Moral Potency Construct

• Moral Ownership - knowing that it is the person’s responsibility to act

• Moral Courage - seeing actions through to their resolution and overcoming the fear that leads to inaction

• Moral Efficacy - the ability to act and be successful in the action
Roadblocks to Moral Ownership

- Justify the unethical act as being "not so bad"
- attributing the unethical act to external sources; "our competitors do it this way", "poor reimbursement made me do it"
- It is tolerated when you are one of many that do it

Ethical Situations

- Issue/Problem – Right vs. Wrong; clear cut answer; values can be challenged
- Dilemma – Right v Right; values are challenged; confronted with two obligations but can’t attend to both
- Distress- you know right, but can’t control; not authorized to take action
- Temptation – Right v Wrong; conflict of interest
- Silence – Values challenges, but no one addressing it

RIPS (Glaser, 1994)

1. Recognize
2. Reflect
3. Decide – using Personal & Professional Ethical Judgment
   - Rules Based Approach
   - Ends Based Approach
   - Care-Based Approach
4. Implement
   - Requires Ethical Courage
   - Prioritized Values
Ethical Analysis Using RIPS

REALMS
- Individual
- Organizational
- Society

Individualized Process
- Ethical Sensitivity
- Ethical Judgment
- Ethical Courage

Situation
- Issue/Problem
- Dilemma
- Distress
- Temptation
- Silence

Most Common Ethical Violations in Healthcare
- Misuse and Inappropriate Supervision of Support Personnel
- Over-utilization of Services
- Documentation
- Insurance Fraud
- Sexual Harassment/Misconduct
- Felony Convictions

Board of Allied Health Professions
10 Easy Ways to Lose Your License (K. Barnes)

1. Boundary violations & sexual misconduct or contact
2. Substance abuse
3. Professional discipline, criminal conviction, unethical conduct
4. Fraud and misrepresentation
5. Patient abuse
6. Medication violations
7. **Unethical behavior**
8. Documentation & record keeping
9. Unlicensed practice
10. Substandard care
Objective 4
Combine your values and ethical practice in assessing ethical dilemmas

Leadership & Ethics Case Discussions

REFERENCES
Refer to LAMP Resource List
Preamble
The Code of Ethics for the Physical Therapist (Code of Ethics) delineates the ethical obligations of all physical therapists as determined by the House of Delegates of the American Physical Therapy Association (APTA). The purposes of this Code of Ethics are to:

1. Define the ethical principles that form the foundation of physical therapist practice in patient/client management, consultation, education, research, and administration.
2. Provide standards of behavior and performance that form the basis of professional accountability to the public.
3. Provide guidance for physical therapists facing ethical challenges, regardless of their professional roles and responsibilities.
4. Educate physical therapists, students, other health care professionals, regulators, and the public regarding the core values, ethical principles, and standards that guide the professional conduct of the physical therapist.
5. Establish the standards by which the American Physical Therapy Association can determine if a physical therapist has engaged in unethical conduct.

No code of ethics is exhaustive nor can it address every situation. Physical therapists are encouraged to seek additional advice or consultation in instances where the guidance of the Code of Ethics may not be definitive.

This Code of Ethics is built upon the five roles of the physical therapist (management of patients/clients, consultation, education, research, and administration), the core values of the profession, and the multiple realms of ethical action (individual, organizational, and societal). Physical therapist practice is guided by a set of seven core values: accountability, altruism, compassion/caring, excellence, integrity, professionalism, and social responsibility. Throughout the document the primary core values that support specific principles are indicated in parentheses. Unless a specific role is indicated in the principle, the duties and obligations being delineated pertain to the five roles of the physical therapist. Fundamental to the Code of Ethics is the special obligation of physical therapists to empower, educate, and enable those with impairments, activity limitations, participation restrictions, and disabilities to facilitate greater independence, health, wellness, and enhanced quality of life.

Principles

**Principle #1:** Physical therapists shall respect the inherent dignity and rights of all individuals.

(Core Values: Compassion, Integrity)

1A. Physical therapists shall act in a respectful manner toward each person regardless of age, gender, race, nationality, religion, ethnicity, social or economic status, sexual orientation, health condition, or disability.

1B. Physical therapists shall recognize their personal biases and shall not discriminate against others in physical therapist practice, consultation, education, research, and administration.

**Principle #2:** Physical therapists shall be trustworthy and compassionate in addressing the rights and needs of patients/clients.

(Core Values: Altruism, Compassion, Professional Duty)

2A. Physical therapists shall adhere to the core values of the profession and shall act in the best interests of patients/clients over the interests of the physical therapist.

2B. Physical therapists shall provide physical therapy services with compassionate and caring behaviors that incorporate the individual and cultural differences of patients/clients.

2C. Physical therapists shall provide the information necessary to allow patients or their surrogates to make informed decisions about physical therapy care or participation in clinical research.

2D. Physical therapists shall collaborate with patients/clients to empower them in decisions about their health care.

2E. Physical therapists shall protect confidential patient/client information and may disclose confidential information to appropriate authorities only when allowed or as required by law.

**Principle #3:** Physical therapists shall be accountable for making sound professional judgments.

(Core Values: Excellence, Integrity)

3A. Physical therapists shall demonstrate independent and objective professional judgment in the patient's/client's best interest in all practice settings.

3B. Physical therapists shall demonstrate professional judgment informed by professional standards, evidence (including current literature and established best practice), practitioner experience, and patient/client values.

3C. Physical therapists shall make judgments within their scope of practice and level of expertise and shall communicate with, collaborate with, or refer to peers or other health care professionals when necessary.

3D. Physical therapists shall not engage in conflicts of interest that interfere with professional judgment.

3E. Physical therapists shall provide appropriate direction of and communication with physical therapist assistants and support personnel.
**Principle #4:** Physical therapists shall demonstrate integrity in their relationships with patients/clients, families, colleagues, students, research participants, other health care providers, employers, payers, and the public.

(Core Value: Integrity)

4A. Physical therapists shall provide truthful, accurate, and relevant information and shall not make misleading representations.

4B. Physical therapists shall not exploit persons over whom they have supervisory, evaluative or other authority (e.g., patients/clients, students, supervisees, research participants, or employees).

4C. Physical therapists shall discourage misconduct by health care professionals and report illegal or unethical acts to the relevant authority, when appropriate.

4D. Physical therapists shall report suspected cases of abuse involving children or vulnerable adults to the appropriate authority, subject to law.

4E. Physical therapists shall not engage in any sexual relationship with any of their patients/clients, supervisees, or students.

4F. Physical therapists shall not harass anyone verbally, physically, emotionally, or sexually.

**Principle #5:** Physical therapists shall fulfill their legal and professional obligations.

(Core Values: Professional Duty, Accountability)

5A. Physical therapists shall comply with applicable local, state, and federal laws and regulations.

5B. Physical therapists shall have primary responsibility for supervision of physical therapist assistants and support personnel.

5C. Physical therapists involved in research shall abide by accepted standards governing protection of research participants.

5D. Physical therapists shall encourage colleagues with physical, psychological, or substance-related impairments that may adversely impact their professional responsibilities to seek assistance or counsel.

5E. Physical therapists who have knowledge that a colleague is unable to perform their professional responsibilities with reasonable skill and safety shall report this information to the appropriate authority.

5F. Physical therapists shall provide notice and information about alternatives for obtaining care in the event the physical therapist terminates the provider relationship while the patient/client continues to need physical therapy services.

**Principle #6:** Physical therapists shall enhance their expertise through the lifelong acquisition and refinement of knowledge, skills, abilities, and professional behaviors.

(Core Value: Excellence)

6A. Physical therapists shall achieve and maintain professional competence.

6B. Physical therapists shall take responsibility for their professional development based on critical self-assessment and reflection on changes in physical therapist practice, education, health care delivery, and technology.

6C. Physical therapists shall evaluate the strength of evidence and applicability of content presented during professional development activities before integrating the content or techniques into practice.

6D. Physical therapists shall cultivate practice environments that support professional development, lifelong learning, and excellence.

**Principle #7:** Physical therapists shall promote organizational behaviors and business practices that benefit patients/clients and society.

(Core Values: Integrity, Accountability)

7A. Physical therapists shall promote practice environments that support autonomous and accountable professional judgments.

7B. Physical therapists shall seek remuneration as is deserved and reasonable for physical therapist services.

7C. Physical therapists shall not accept gifts or other considerations that influence or give an appearance of influencing their professional judgment.

7D. Physical therapists shall fully disclose any financial interest they have in products or services that they recommend to patients/clients.

7E. Physical therapists shall be aware of charges and shall ensure that documentation and coding for physical therapy services accurately reflect the nature and extent of the services provided.

7F. Physical therapists shall refrain from employment arrangements, or other arrangements, that prevent physical therapists from fulfilling professional obligations to patients/clients.

**Principle #8:** Physical therapists shall participate in efforts to meet the health needs of people locally, nationally, or globally.

(Core Value: Social Responsibility)

8A. Physical therapists shall provide pro bono physical therapy services or support organizations that meet the health needs of people who are economically disadvantaged, uninsured, and underinsured.

8B. Physical therapists shall advocate to reduce health disparities and health care inequities, improve access to health care services, and address the health, wellness, and preventive health care needs of people.

8C. Physical therapists shall be responsible stewards of health care resources and shall avoid overutilization or underutilization of physical therapy services.

8D. Physical therapists shall educate members of the public about the benefits of physical therapy and the unique role of the physical therapist.
Standards of Ethical Conduct for the
Physical Therapist Assistant
HOD S06-09-20-18 [Amended HOD S06-00-13-24; HOD 06-91-06-07; Initial HOD 06-82-04-08] [Standard]

Preamble
The Standards of Ethical Conduct for the Physical Therapist Assistant (Standards of Ethical Conduct) delineate the ethical obligations of all physical therapist assistants as determined by the House of Delegates of the American Physical Therapy Association (APTA). The Standards of Ethical Conduct provide a foundation for conduct to which all physical therapist assistants shall adhere. Fundamental to the Standards of Ethical Conduct is the special obligation of physical therapist assistants to enable patients/clients to achieve greater independence, health and wellness, and enhanced quality of life.

No document that delineates ethical standards can address every situation. Physical therapist assistants are encouraged to seek additional advice or consultation in instances where the guidance of the Standards of Ethical Conduct may not be definitive.

Standards

**Standard #1:** Physical therapist assistants shall respect the inherent dignity, and rights, of all individuals.

1A. Physical therapist assistants shall act in a respectful manner toward each person regardless of age, gender, race, nationality, religion, ethnicity, social or economic status, sexual orientation, health condition, or disability.

1B. Physical therapist assistants shall recognize their personal biases and shall not discriminate against others in the provision of physical therapy services.

**Standard #2:** Physical therapist assistants shall be trustworthy and compassionate in addressing the rights and needs of patients/clients.

2A. Physical therapist assistants shall act in the best interests of patients/clients over the interests of the physical therapist assistant.

2B. Physical therapist assistants shall provide physical therapy interventions with compassionate and caring behaviors that incorporate the individual and cultural differences of patients/clients.

2C. Physical therapist assistants shall provide patients/clients with information regarding the interventions they provide.

2D. Physical therapist assistants shall protect confidential patient/client information and, in collaboration with the physical therapist, may disclose confidential information to appropriate authorities only when allowed or as required by law.

**Standard #3:** Physical therapist assistants shall make sound decisions in collaboration with the physical therapist and within the boundaries established by laws and regulations.

3A. Physical therapist assistants shall make objective decisions in the patient’s/client’s best interest in all practice settings.

3B. Physical therapist assistants shall be guided by information about best practice regarding physical therapy interventions.

3C. Physical therapist assistants shall make decisions based upon their level of competence and consistent with patient/client values.

3D. Physical therapist assistants shall not engage in conflicts of interest that interfere with making sound decisions.

3E. Physical therapist assistants shall provide physical therapy services under the direction and supervision of a physical therapist and shall communicate with the physical therapist when patient/client status requires modifications to the established plan of care.

**Standard #4:** Physical therapist assistants shall demonstrate integrity in their relationships with patients/clients, families, colleagues, students, other health care providers, employers, payers, and the public.

4A. Physical therapist assistants shall provide truthful, accurate, and relevant information and shall not make misleading representations.

4B. Physical therapist assistants shall not exploit persons over whom they have supervisory, evaluative or other authority (e.g., patients/clients, students, supervisees, research participants, or employees).

4C. Physical therapist assistants shall discourage misconduct by health care professionals and report illegal or unethical acts to the relevant authority, when appropriate.
4D. Physical therapist assistants shall report suspected cases of abuse involving children or vulnerable adults to the supervising physical therapist and the appropriate authority, subject to law.

4E. Physical therapist assistants shall not engage in any sexual relationship with any of their patients/clients, supervisees, or students.

4F. Physical therapist assistants shall not harass anyone verbally, physically, emotionally, or sexually.

**Standard #5:** Physical therapist assistants shall fulfill their legal and ethical obligations.

5A. Physical therapist assistants shall comply with applicable local, state, and federal laws and regulations.

5B. Physical therapist assistants shall support the supervisory role of the physical therapist to ensure quality care and promote patient/client safety.

5C. Physical therapist assistants involved in research shall abide by accepted standards governing protection of research participants.

5D. Physical therapist assistants shall encourage colleagues with physical, psychological, or substance-related impairments that may adversely impact their professional responsibilities to seek assistance or counsel.

5E. Physical therapist assistants who have knowledge that a colleague is unable to perform their professional responsibilities with reasonable skill and safety shall report this information to the appropriate authority.

**Standard #6:** Physical therapist assistants shall enhance their competence through the lifelong acquisition and refinement of knowledge, skills, and abilities.

6A. Physical therapist assistants shall achieve and maintain clinical competence.

6B. Physical therapist assistants shall engage in lifelong learning consistent with changes in their roles and responsibilities and advances in the practice of physical therapy.

6C. Physical therapist assistants shall support practice environments that support career development and lifelong learning.

**Standard #7:** Physical therapist assistants shall support organizational behaviors and business practices that benefit patients/clients and society.

7A. Physical therapist assistants shall promote work environments that support ethical and accountable decision-making.

7B. Physical therapist assistants shall not accept gifts or other considerations that influence or give an appearance of influencing their decisions.

7C. Physical therapist assistants shall fully disclose any financial interest they have in products or services that they recommend to patients/clients.

7D. Physical therapist assistants shall ensure that documentation for their interventions accurately reflects the nature and extent of the services provided.

7E. Physical therapist assistants shall refrain from employment arrangements, or other arrangements, that prevent physical therapist assistants from fulfilling ethical obligations to patients/clients.

**Standard #8:** Physical therapist assistants shall participate in efforts to meet the health needs of people locally, nationally, or globally.

8A. Physical therapist assistants shall support organizations that meet the health needs of people who are economically disadvantaged, uninsured, and underinsured.

8B. Physical therapist assistants shall advocate for people with impairments, activity limitations, participation restrictions, and disabilities in order to promote their participation in community and society.

8C. Physical therapist assistants shall be responsible stewards of health care resources by collaborating with physical therapists in order to avoid overutilization or underutilization of physical therapy services.

8D. Physical therapist assistants shall educate members of the public about the benefits of physical therapy.
LEADERSHIP 101
Personal Leadership Development: The Catalyst for Leading Within

PERSONAL LEADERSHIP DEVELOPMENT:
A Practical Application

Objectives

1. Understand the process for your Personal Leadership Development Practical Application
   - Leadership Self-Assessment
   - Personal Leadership Development Plan

2. Preparing for Leadership 201: Advanced Leadership Development
How do you keep the “LAMP” lit?

• This is not the ending – it’s a beginning... but only if you make it happen.

• Why does the light go out?
  – Not invested
  – Distracted by work, family, other commitments
  – Lack of a PLAN
  – Failure to follow the plan

Keeping the LAMP turned on.

Investment in the process – making the “Deep Change” (Quinn)

• Leadership Self-Assessment, Reflection and Summary
• Developing Goals and Action Plans
• Identifying what help you need/want
• Doing the work

CERTIFICATION REQUIREMENTS

HPA LAMP Certificate in Leadership Development

Leadership 101: Personal Leadership Development: The Catalyst for Leading

Leadership 201: Advanced Leadership Development: The Catalyst for Leading

Leadership Self-Assessment
WHERE DO I START?

ACCELERATING LEADERSHIP AND INNOVATION

LEADERSHIP SELF-ASSESSMENT:
SORTING AND SUMMARIZING

Leadership Self-Assessment

Four loci of leadership:
- **Personal** – awareness of self, values, ethics
- **Interpersonal** – values others, communication, managing conflict
- **Group/Unit/Organizational** – developing teams, leading change, managing projects
- **Community** – practicing citizenship, advocacy, legislative action
PERSONAL LEADERSHIP DEVELOPMENT:  
THE PLAN
Five Steps to Completion

Resources to Use for PLDP

• Leadership Self-Assessment
• Personal Mission and Vision Statements
• Color Profile
• Communication Style
• Conflict Management Style
• LAMP 101 information...

COMPLETE THE LEADERSHIP SELF-ASSESSMENT

Step 1
1. Pages 1 – 4
2. SUMMARIZE Strengths and Weaknesses in each of the four areas (Personal, Interpersonal, Organization and Community)
3. IDENTIFY the leadership skills/attributes you wish to develop in each of the four areas
4. DISTILL/FOCUS down to TWO leadership skills or attributes for the purpose of the Personal Leadership Development Plan
Step 2

COMPLETE THE PERSONAL LEADERSHIP DEVELOPMENT PLAN

1. Pages 1–4
2. SUMMARIZE Strengths and Weaknesses in each of the four areas (Personal, Interpersonal, Organization and Community)
3. IDENTIFY the leadership skills/attributes you wish to develop in each of the four areas
4. DISTILL/FOCUS down to TWO leadership skills or attributes for the purpose of the Personal Leadership Development Plan

Personal Development Plans

• In addition to the two leadership skills identified through the self-assessment, you may also consider the option to choose one goal from your Personal Vision Statement
• Write up to 3 steps/objectives that will help you accomplish one key part of your goal
• Write the objectives as skills, knowledge or attitudes to attain–what must you acquire or improve?
• For each objective choose a measure to show you have reached it – how will you know you did it?
• Write some development activities to help get you there – how will you actually gain/build/develop these objectives?
• Identify potential mentors – who will help you with your development?
• Last write a target date

Step 3

ESTABLISH A PLAN OF ACTION: 3 COMPONENTS

1. Leadership goals/Skills to develop
2. Specific mechanisms to achieve goals
3. Anticipated outcomes – how will you measure?

(Refer to page 6 of the PLDP)
### Step 4

**GENERATING IDEAS**
- ✓ Identify potential projects to develop leadership skills

**SETTING YOUR GOALS**
- **BEHAVIOR** – describe leadership behavior
- **CONDITION** – setting, locus of leadership
- **DEGREE** – criteria for measurement, timeframe

✓ The focus of the Plan is PERSONAL leadership development (not leading others... yet)

### Step 5

**COMPLETION OF YOUR LEADERSHIP DEVELOPMENT PLAN**

1. Presentation of your PERSONAL LEADERSHIP DEVELOPMENT PLAN during the small group feedback sessions at a LAMP 201 course.

2. LAMP faculty and fellow participants at LAMP 201 will offer feedback regarding your idea(s) for your Personal Leadership practical application (LAMP 202).