National Cooperative of Health Networks Association, Inc.

2012 - 2013

# Network Leadership and Development Workbook

**Do Your Best & Link to the Rest**

# Table of Contents

# Welcome to the NCHN Leadership Learning Community

NCHN's mission is to support and strengthen health networks through collaboration, networking, leadership development and education. As our mission statement reflects, NCHN is committed to creating opportunities and programs that support our members as they expand their creative capacity as leaders. Continual learning and exploring in a leadership community devoted to excellence supports bold and innovative thinking and action leaders.

In 2011, we announced the implementation of a new Learning Community devoted to Network Leaders' Personal Leadership and Development. The participants of the first learning community declared this year-long immersion a success. In conjunction with the 2012 Leadership Summit, we are pleased to announce that we will again offer the NCHN Leadership Learning Community experience as an extension of the Leadership Summit. This program was developed exclusively for Network Leaders by a former Network Leader and NCHN member, Dr. Mary Kay Chess. After our face-to-face Summit meeting, we will continue with virtual sessions on leadership skills and a final face-to-face meeting during the 2013 NCHN Annual Educational Conference in New Orleans, Louisiana. The two Leadership Learning Communities, the 2011 Transformer Community and the new 2012 Leadership Learning Community, will meet 4-6 times respectively over the next seven (7) months, September 2012 – April 2013, to discuss topics ranging from change and change tools to board development and accountability.

Participation for NCHN members in good standing is free of charge. Members must complete an application of interest and attend the 2012 NCHN Leadership Summit to be a participant in the program. Attendance in all virtual meetings and the April 2013 face-to-face community meeting is required to earn a Certificate of Participation. The time commitment to the program is ten (10) hours of engagement directly with the NCHN Leadership Learning Community and individual time to complete the assigned activities in the Network Leadership Workbook over the next seven months following the 2012 Leadership Summit.

Participants in the Leadership Learning Community are encouraged to expand their leadership learning and networking opportunities through NCHN's other activities, such as:
- **Coffee/Tea Chats:** Coffee/Tea Chats are held once a month as a one-hour phone conversation on

the business accountabilities of network leaders. The topics are suggested by members and range from strategic planning to the design of new business lines and products. NCHN Members are free to choose their level of participation and most leaders choose to attend each month as resources and best practices are widely shared among the participants in the chats. There is no charge for NCHN members in good standing.

- **RHNR Consulting Services Program:** Many health networks, both new and established, rely on the services of outside consultants to obtain assistance and guidance. The National Cooperative of Health Networks Association (NCHN) Network Member Executives and Associate Members have an invaluable wealth of network knowledge and expertise. Rural Health Network Resources, LLC (RHNR), wholly owned by NCHN, has developed a Consulting Group to provide referral services for health networks. RHNR will develop a database of consultants and specializations and connect networks seeking services to consultants with the requisite expertise.

- **Annual Educational Conference:** NCHN offers a two and a half day educational conference each spring. The agenda is developed and managed by NCHN members to ensure that the current needs and challenges of network leaders are met. Sessions include both NCHN members sharing their expertise and leaders across the health care spectrum. Conference participants continually report that, in terms of meeting and networking with their peers and learning from each other, it is the best conference in which they have participated.

- **On-Line Discussion Forum:** NCHN offers NCHN members access to a free on-line discussion forum. The forum can be used to post questions, start a discussion about a hot topic, and/or share best practices and lessons learned.

We look forward to working with you and welcome feedback and suggestions on how to improve the leadership program for future participants. Thank you for your continued support and dedication to the members of your network, the patients those members serve, and to the  NCHN Leadership Learning Community.

Sincerely,

Heather Fuller, NCHN President
Executive Director, Sunflower Health Network (KS)

## Message from Mary Kay Chess, Ph.D.

Why are you exploring your leadership at this time? This Workbook and Personal Leadership Development Plan (PLDP) allows you to create a sound assessment of your current leadership skills. This exploration applies to leaders of mature networks, start-up networks or loose affiliations of interested community members.

Our business and healthcare environments are in constant change and this implies that leaders must grow and adapt as well. Each section of this Workbook focuses on skills needed by today's leaders and you will have an opportunity to set goals, measure your progress and celebrate your transformation.

This Workbook has two distinct sections:

- There are ten (10) distinct "Units" examining your current and potential leadership skills; and,
- The Personal Leadership Development Plan (PLDP) in Appendix A

Each Unit describes the purpose and objective of engaging in developing the leadership skill. You might encounter a structured experience in a Unit and then be asked to reflect on new leadership goals over several weeks. As you determine a leadership skill and goal, these are noted in the Personal Leadership Development Plan (PLDP) throughout the NCHN Leadership Learning Community.

Although this Workbook includes space for writing your observations, feel free to employ any form of engagement in building your leadership skills: draw, paint, and pull in photographs that represent your journey. Create and post a video. As you identify Resources in each Unit, you can post your findings on the NCHN website so others engaged in this learning process can observe your growth as well. Enjoy this journey of leadership development in the company of committed colleagues!

And, welcome to the NCHN Leadership Learning Community.

Best,
Mary Kay

# Unit 1

**Facilitation for Innovation and Collaboration**

# 1. Leadership Purpose

Understanding facilitation as a key leadership skill to direct and guide the strategic work of the network.

# 2. Learning Objectives

- Personal Mastery
- Creative Approaches to Conflict
- Understanding Personal Preferences

# 3. Resources

- TEDxHampshireCollege - Jay Vogt: *The Art of Facilitation: Changing the Way the World Meets*
  Link: http://tedxtalks.ted.com/video/TEDxHampshireCollege-Jay-Vogt-T

  Jay W. Vogt founded Peoplesworth, a private practice in organizational development, in 1982 and he has facilitated thousands of meetings and retreats since. Jay is the author of Recharge Your Team: The Grounded Visioning Approach and Board Roles to Board Goals: Creating an Annual Board Workplan. In this talk he discusses the relationship between group meeting structures and the results we get from those gatherings.

- Add one additional resource:

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# 4. Experience:

The topic of engaging facilitation will be explored at the NCHN Leadership Summit in Kansas City, Missouri. In this workshop, you will have an opportunity to consider:

- Assumptions about perspectives, conversations & conflict
- A Business case for Team Agreements
- Decision-making Approaches

# 5. Questions to Consider

Leadership Preferences:  Take about 20 minutes to explore your preferences through taking this on-line assessment: http://www.humanmetrics.com/cgi-win/jtypes2.asp

Once you have completed this assessment, your preferences for work environments, conversations and interactions in groups and teams will be captured in four letters.  You may find it interesting to explore this web site for additional details on the meaning of this particular assessment.  Note that there are many leadership assessments on the market and they serve as tools to assist you in understanding your personal engagement and communication preferences.

Over the next four weeks, you will have a chance to explore questions around your approach to facilitation.  In Unit 1 there is one exercise a week designed to build your facilitation skills.

Time required:  30 minutes each week for the next four weeks.

Approach:  Leaders find it critical to block out the thirty minutes for these personal development sessions in the months to come.  This level of commitment to your own leadership development supports progress.
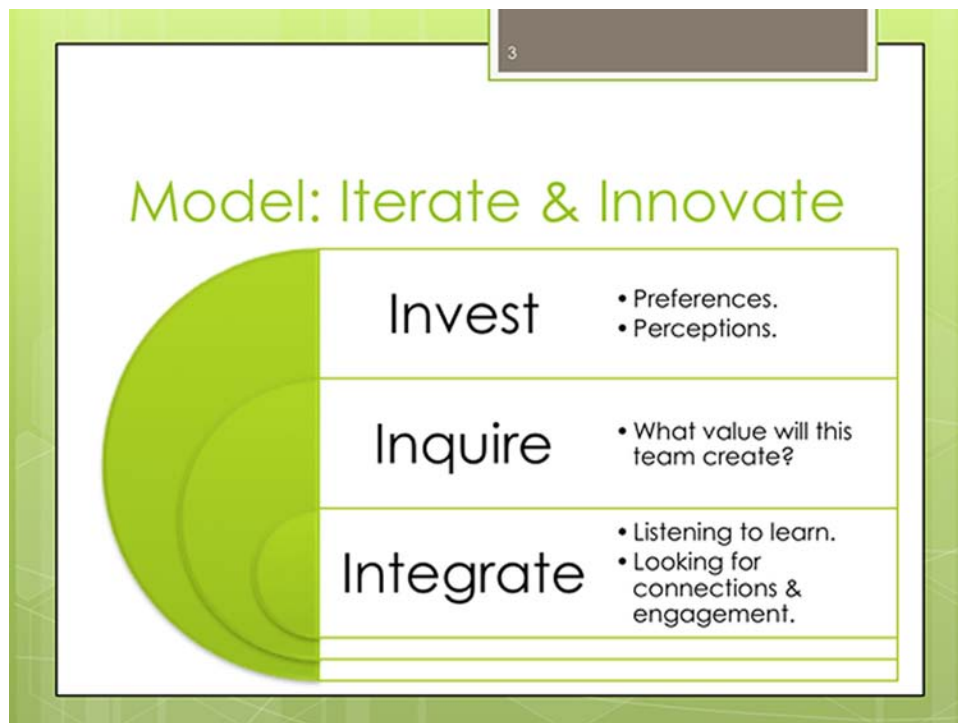
## Week 1: Preferences and Perceptions

As you consider the result of your on-line assessment, answer the following questions as clearly and succinctly as possible – you can use "bullets", art, story-telling or any approach allowing you to explore these leadership preferences:

What surprised me about my leadership from this assessment?  What is shifting around my perceptions about my ability to lead and facilitate meetings?

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## Week 2: Team & Meeting Agreements

Consider your last month of meetings and identify one very "positive meeting" and a meeting that was a "waste of time". What "agreements", spoken or unspoken, seemed to drive the outcome of each of these meetings? What one or two team or meeting agreement are you willing to suggest in a future meeting?

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# Week 3:  Listening and Connecting

Think back to the preferences identified in the on-line assessment.

What is an example of how you demonstrated these preferences in a recent meeting?  Did you leave this meeting believing you learned several new insights about an issue and, were you able to effectively provide your opinions on the issue?

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# Week 4: Iterate and Innovate

When I facilitate a meeting, here are three to four team or group agreements that are essential for a successful outcome:

1. _____

2. _____

3. _____

4. _____


When there is conflict in the meeting – I will focus on 2 of the following approaches and build and continue to measure my facilitator competency in these two areas over the next 45 days.  I will create workable and tangible goals around these two skills and "rate" myself on my progress at the beginning and end of the 45 days:

_____ Avoid Defensiveness

_____ Revisit the Team or Meeting Agreements

_____ Reconfirm the Expectations in the Room

_____ Remain a Facilitator, Avoid Taking a Position

_____ Remain Deeply and Obviously Respectful

_____ Listen Deeply

_____ All Voices are Heard

_____ Use Humor

_____ Relax My Body, Slightly Bend my Knees

_____ Revisit the Agenda

## 5. Action

Document the results of the assessment you took on-line and your goals for dealing effectively with conflict (see above) in your Personal Leadership Development Plan (Appendix A, p. 87).

## NOTES

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# Unit 2

## Communication in Complex Environments

# 1. **Leadership Purpose**

Understanding preferred communication style and options

Most leaders acknowledge that in a busy work-day, they have an approach to communication they prefer. At times, it is email. Other leaders prefer face-to-face meetings whenever possible and they will re-arrange complex schedules to make sure the meetings take place. And, other leaders may prefer to use the phone or Skype. In this section, you will have a chance to observe and experiment with your own communication preference. There will also be an opportunity to experiment for a short period of time with another approach so you continue to build your leadership foundation.

# 2. **Learning Objectives**

- Stakeholder Assessment
- Communication Approaches
- Personal Mastery

# 3. **Resources**

- Ronald Heifetz highlights the leadership competency of responsive communication in his book, *Leadership Without Easy Answers* (Belknap Press of Harvard University, 1999). In addition, he asks us to also consider our ability to listen to others.

- Add one additional resource:

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## 4. Experience:

Most of us engage in "communication" hundreds of times of day with a number of different individuals in many different settings. As a leader, sound and engaging communication is a key attribute to success. Begin to be curious about communication and observe others in action. What might you adapt and what would you never engage in as you listen deeply to attempts made to communicate issues, opportunities, perceptions and innovate ideas.

## 5. Questions to Consider

Leadership Communication: Engaging Storytelling

Time required: 30 minutes each week for the next four weeks.

Approach: Identify 30 minutes on your calendar to respond to the designated questions on the following page. This should be uninterrupted time and avoid checking email. This is "real" work.

## Week 1

In three paragraphs, I am telling the story of where I have been, where I am now and where I think I might be going on my personal leadership journey:

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## Week 2

What surprised me as I retold the story of my leadership journey to-date?

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# Week 3

What is my preferred communication style?

What might emerge if I try another approach for the next 30 days?  Try a new communication approach.  Set a specific yet manageable communication goal for the next 30 days and monitor your progress.

My current and preferred communication style (Example:  email):  _____

My communication experiment for the next 30 days:

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**Thirty days**

Month: _____

Days:  _____

## Week 4

What did I discover over the last week when I experimented with a new communication style?

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# 6. Action
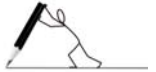
Document your preferred communication style in your Personal Leadership Development Plan (p. 88).

## NOTES

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# Unit 3

## Values and Value Clarification

You each have a leadership preference and there are many leadership approaches to choose from: collaborative, adaptive, transformative, authentic or, cooperative.

We think of values as deeply held beliefs about what is important to us in work, life, family and community. Values are often thought of as "rules of the road" and they provide guidance for decisions we make. We have added this section to the Leadership curriculum because we live and work in complex and changing environments and organizations. Although values guide our actions and the actions of those around us, we often have not taken the time to thoughtfully and consciously consider our values at this time in our careers and lives.

As we continue to gain experience, the definitions of our values may change. We may not even realize that we have silently and without notice selected new values or refined our meaning of a particular value. The intent of this exercise on "values clarification" is to allow you a designated time to become aware of values and the influence they hold. Once you spend time selecting, confirming and prioritizing your values, you gain a set of very practical tools to guide your work as a leader in an organization and in your community.

# 1. Leadership Purpose

Personal clarity and definition of values.

# 2. Learning Objectives:

- Motivation
- Preferences
- Personal Mastery

# 3. Resources:

- Peter Senge is recognized as a leader in personal and organizational excellence. His work, *The Fifth Discipline: The Art & Practice of The Learning Organization* (Doubleday, 2006) provides the challenging foundational thinking of this leadership exploration. Senge addresses values and the critical role they play in our leadership effectiveness throughout this book.

- Add one additional Resource:
  _____

# 4. Experience: Value Selection and Definition

Process for selecting your values: Time required initially – 30 to 60 minutes

1.  Review the values on the following page. At the bottom there are a few blank lines. Use these lines to add any additional values that are important to you, but are not listed.
2.  Circle all of the values that are very important to you, including any you may have added.
3.  Take the next five minutes to consider the values you selected and, the values you did not select. What values have served you well in the past?
4.  Now, narrow the list of your preferred values down to eight values by crossing off less essential ones or circling more important ones. Engage in this exploration for the next two to three minutes.
5.  Continue your exploration and narrow the list to five values, using the same process.
6.  Now, narrow the list to your top three values.
7.  And finally, create definitions for each of your selected values.

## My Values Defined:

*Example: Authenticity – to live an authentic life and be able to use my natural talents and gifts.*

Value                           Definition

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                                     _____

_____          _____

                                     _____

_____          _____

                                     _____

| | | | |
|---|---|---|---|
| Acceptance | Ethics | Laughter | Security |
| Achievement | Excellence | Leadership | Self-acceptance |
| Accountability | Excitement | Learning | Self Expression |
| Advancement | Expertise | Love | Self-reliance |
| Adventure | Fairness | Loyalty | Self-respect |
| Altruism | Faith | Making a Difference | Service |
| Ambition | Fame | Nature | Sharing |
| Appreciation | Family | Nurturing | Simplicity |
| Authenticity | Fast Pace | Order | Solitude |
| Authority | Financial Rewards | Partnership | Spirituality |
| Autonomy | Focus | Passion | Stability |
| Balance | Freedom | Peace | Status |
| Beauty | Friendship | Personal development | Success |
| Belonging | Fun | Playfulness | Teaching |
| Challenge | Happiness | Pleasure | Team Work |
| Choice | Harmony | Popular | Tolerance |
| Collaboration | Health | Power | Tradition |
| Commitment | Helpfulness | Pride | Tranquility |
| Community | Honesty | Privacy | Travel |
| Communication | Humor | Productivity | Trust |
| Community | Honor | Prosperity | Truth |
| Compassion | Imagination | Reaching potential | Variety |
| Competition | Independence | Recognition | Wealth |
| Connection | Influence | Resilience | Winning |
| Contribution | Integrity | Respect | Wisdom |
| Cooperation | Intellect | Responsibility | Zest for Life |
| Courage | Intuition | Results | _____ |
| Creativity | Involvement | Risk Taking | _____ |
| Delight | Joy | Romance | _____ |
| Economic security | Justice | Routine | _____ |
| Equality | Kindness | Safety | |

# 5. Questions to Consider

Values and Value Creation

Time required - 30 minutes each week for the next four weeks.

## Week 1

Continue to tell your leadership story here and enjoy the process. In four (4) paragraphs, talk about your cultural heritage, your favorite place on the planet, your extended family, and a mentor who influenced your life.

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## Week 2

Identify 30 minutes on your calendar and quickly respond to questions A/B/C below.  This should be uninterrupted time and avoid checking email.

## Week 3

Identify 30 minutes on your calendar and edit your responses to the three questions (A/B/C) below. This too should be uninterrupted time and avoid checking email.

## Week 4

Identify 30 minutes on your calendar of uninterrupted time and explore Question D.

    A.  Why is it critical to determine my values?

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    B.  How do my values align with the values of my Network and Board?  Feel free to use images or words to respond to this inquiry.

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    C.  Where do I engage in my best thinking?  Is there a photo you have taken that represents your answer to this question?

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_____

    D.  What one action will you consistently try-out for the next 30 days?   How will I measure my success?

Action: _____
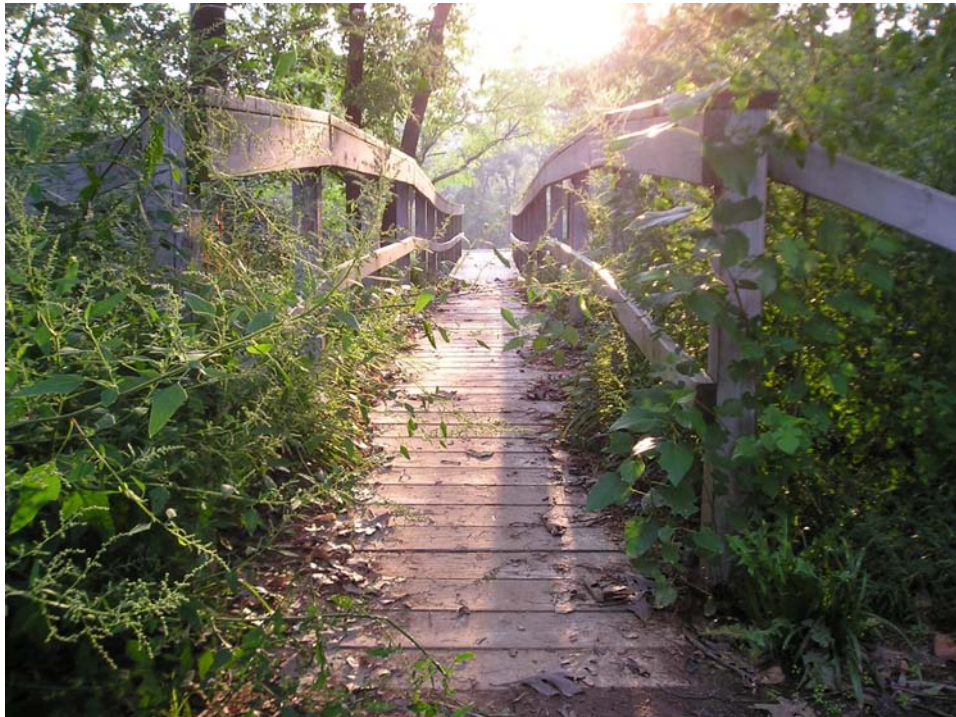
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Success: _____

# 6. Action

Move to your Personal Leadership Development Plan (p.89) and add these values and the definitions of each value.  Determine how you will measure your success in 3, 6, and 12 months.

## Notes

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# Unit 4

**Change & Change Tools**

# 1. Leadership Purpose

Personal understanding of change and leadership tools for engaging in change.

# 2. Learning Objectives

- Creative Thinking
- Adaptation
- Relaxation

# 3. Resources

If you have a particular interest in this topic of change, here is an additional resource to consider.
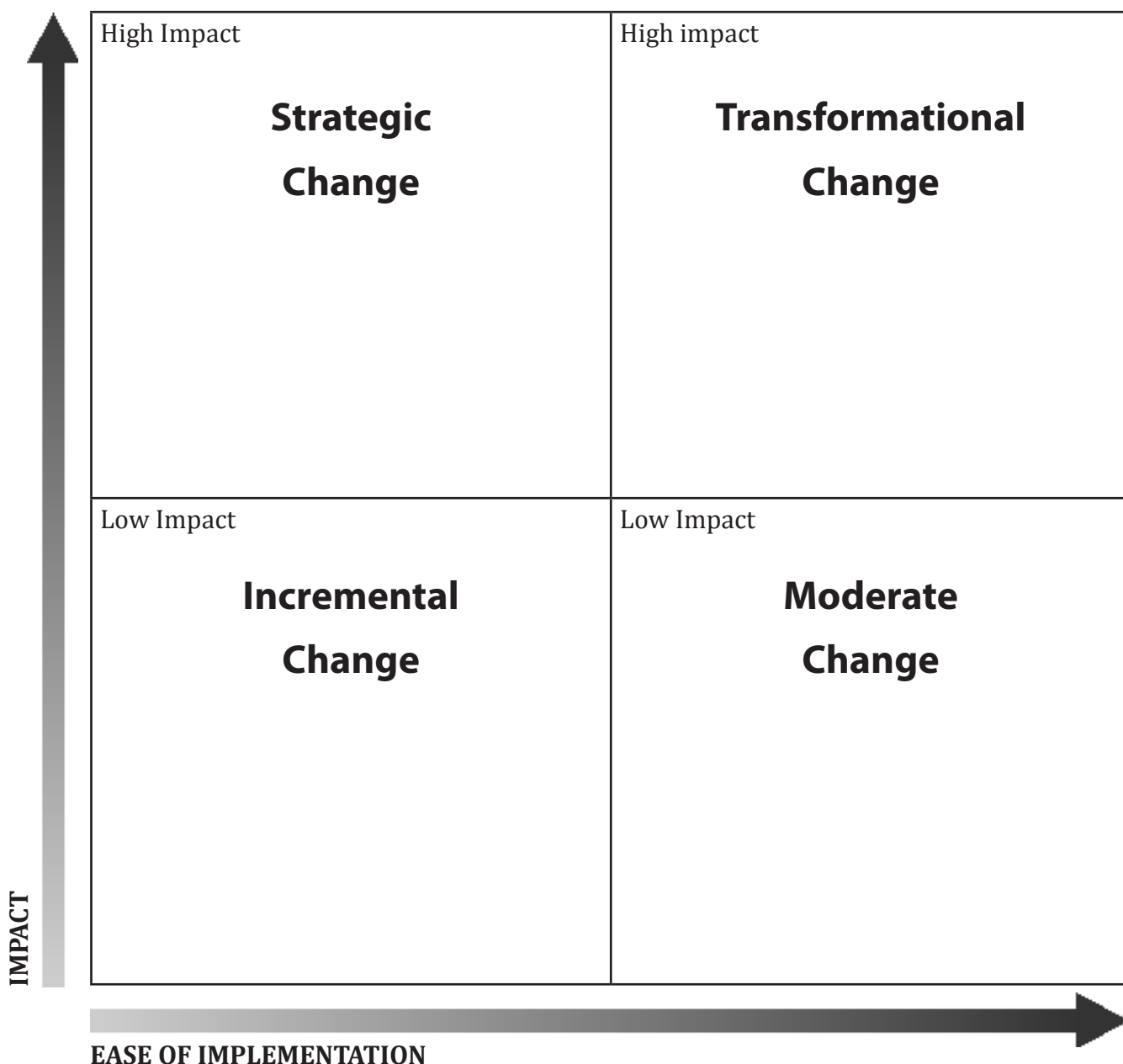
- Robert Egger writes about his personal leadership experiences in transforming funding streams for a non-profit soup kitchen in the DC community in his book, *Begging for Change: The Dollars and Sense of Making Nonprofits Responsive, Efficient, and Rewarding for All* (HarperCollins, 2004).

- Add one additional resource:

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## 4. Experience

Continuing to explore the path to authentic leadership is fundamental to your growing leadership skills and self-awareness. The leadership path and the Personal Leadership Development Plan create the conditions for authentic and adaptive leadership in the midst of significant change. You can determine when, how and why you will take advantage of these change conditions.

Engage in the following four-step process for completing the Change Grid below: Charting the Momentum of Change.

| High Impact | High impact |
|---|---|
| **Strategic Change** | **Transformational Change** |
| Low Impact | Low Impact |
| **Incremental Change** | **Moderate Change** |

**IMPACT**

**EASE OF IMPLEMENTATION**

The Change Grid on the previous page allows you to create a personal graphic around the changes implied in the strategic plan of your network and the goals outlined in your agreement or contract with the Board.  Note that the greatest change occurs in the upper right hand box and this outcome requires the most intense investment of leadership time and skill.  There are four steps below to create a personalized view of the change you are currently leading in your network.

a.  Create a listing of the major outcomes expected of you and your network for the next twelve months:

| Outcome | Impact of change | | Effort of Leadership | | Effort (S/I/M/T) |
| --- | --- | --- | --- | --- | --- |
| | Hi | Low | Hi | Low | |
| 1. _____ | ☐ | ☐ | ☐ | ☐ | _____ |
| 2. _____ | ☐ | ☐ | ☐ | ☐ | _____ |
| 3. _____ | ☐ | ☐ | ☐ | ☐ | _____ |
| 4. _____ | ☐ | ☐ | ☐ | ☐ | _____ |
| 5. _____ | ☐ | ☐ | ☐ | ☐ | _____ |

b.  Pre-work:  For each specific outcome, indicate if the impact of implementation will be High or Low and if the leadership effort will be significant (indicate "Hi" for the outcome) or if the leadership effort is simply a part of the daily workload and therefore, "Low" for this outcome.

c.  Now, review each outcome above and determine the change effort required for each:
   • Strategic Change:  There is a strategic mandate, aligned and informed stakeholders and firm deadlines for completion.  Place an "S" on the CHANGE ASSESSSMENT Grid above.
   • Incremental Change:  There are casual and on-going conversations about outcomes that would be "nice to have".  There are no written goals or outcomes for these changes that appear to emerge over time.  Place an "I" on the CHANGE ASSESSMENT Grid above.
   • Moderate Change:  These are the changes that occur through process improvement efforts for on-going and mandated work:  monthly financials, value reports, community assessments, or regular board meetings.  Place an "M" on the CHANGE ASSESSMENT Grid above.
   • Transformational Change:  A strategic mandate that significantly grows in size and scope and impacts new and previously uninvolved stakeholders in a positive or negative fashion as well as current aligned stakeholders.  Place a "T" on the CHANGE ASSESSMENT Grid above.

d.  Final Step: Plot each outcome (use the number of the specific outcome) using the fourth column, "Effort", only from the CHANGE ASSESSMENT Grid above.   For example, you may need to create two new business lines as the number one outcome and you have decided the change effort will be moderate because your board has already agreed to seven new business lines.  Now, consider how accurate were you in your pre-determination of the leadership effort for each outcome?

## 5.  Questions to Consider:

Allow four weeks for consideration of this question of "change" and how change is supported in your organization.

Approach: Create an uninterrupted 30 minutes session on your calendar for the next four weeks and entitle each session:  Change Potential.

## Week 1

Review the summary of the twelve months of work you plotted on the **Change Grid:  CHARTING THE MOMENTUM OF CHANGE.**

What is your estimate of the time and resources you will need for each of the outcomes?

Outcome          Time Needed          Resources

1. _____          _____          _____

2. _____          _____          _____

3. _____          _____          _____

4. _____          _____          _____

## Week 2

Based on the assessment you completed last week on the time and resources needed for each outcome, would you modify the placement of any work plotted on the Change Grid: CHARTING THE MOMENTUM OF CHANGE? If so, make the modifications.

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## Week 3

Move to your Personal Leadership Development Plan (PLDP), Values (p. 76). Compare your values to the estimated time and resources needed for each outcome. Is there alignment? If not, what is needed to ensure alignment? Use the images below to facilitate your assessment.



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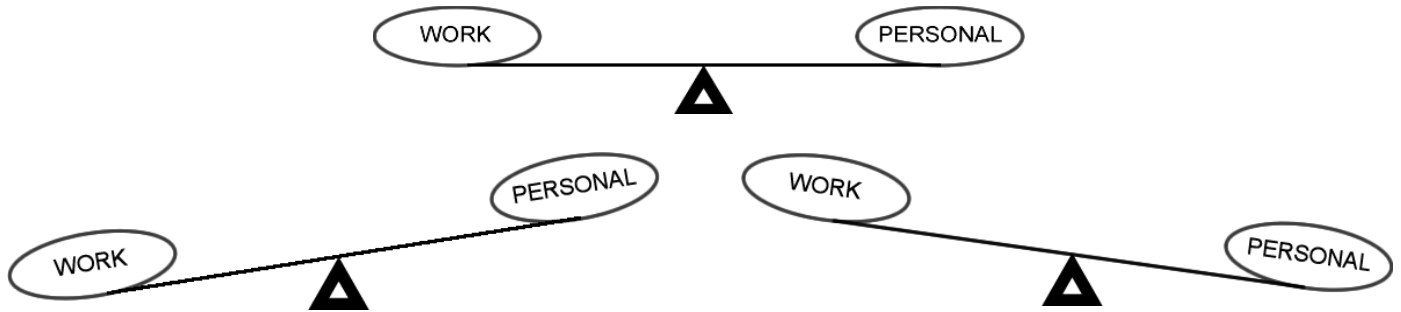
## Week 4

Revisit your assessment from last week. If alignment is required, what changes will you request and put into action? If you are a participating in the NCHN Executive Coaching Program as a coachee, you may find it helpful to engage in this final assessment with your coach as well. If you are a coach in the Executive Coaching Program, you may find it helpful to discuss this model of assessment with your peer coaches.

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# 6. Action

Move to your Personal Leadership Development Plan (PLDP), Change and Change Tools (p. 90). Complete this statement on your leadership vision for change based on alignment of your values and the mandated network outcome and indicate a date you expect full implementation of this leadership vision:

**My leadership strategy for change is:**

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# Unit 5

## Leadership Preferences & Personal Sustainability

## 1. Leadership Purpose

Determining your preferred leadership approach and aligning values and growth.

## 2. Learning Objectives

- Motivation
- Learning Preferences
- Leadership Preferences

## 3. Resources

- Barry Johnson created a comprehensive and provocative exploration of complexity in his book, *POLARITY MANAGEMENT:  IDENTIFYING AND MANAGING UNSOLVABLE PROBLEMS (HRD Press, 1996*).  He includes exercises that provide additional training for leaders.

- Add one additional resource:

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## 4. Experience:

Continuing to explore the path to authentic leadership is fundamental to your growing leadership skills and self-awareness.  The leadership path and the Personal Leadership Development Plan (PLDP) create the conditions for authentic and adaptive leadership.  You can determine when, how and why you will take advantage of these conditions and the NCHN Leadership Learning Community supports your work.

Competing Commitments/Assumptions:
For many of us, our leadership approach mirrors the complexity and chaos talked about in the business

section of the Wall Street Journal (WSJ) or the Financial Times.  In this Unit, we take time to examine our leadership preferences and then, compare our preferences to the current reality.  Often, we realize we have competing commitments and an assumption that as leaders we must, "do it all".  If you discover competing commitments, this is your opportunity to consider options for resolving these gaps.

Values and Competing Commitments:
Take time to review your work in Unit 2 on your values.  What competing commitments are emerging between your values and where you currently spend your time?  How are your commitments contributing to and enhancing your authentic leadership engagement?  How would you define these commitments? Example of competing commitments: Over-commitment – saying yes to an extra project from the Network Board and saying no to my personal exercise program.  This results in…

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As I increase my self-awareness as a leader, what options exist for reconciling some of my competing commitments?

| Value | Where I spend my time | Alignment or Opportunity/What Change? |
|---|---|---|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |

Think about 3 specific accomplishments you made in the last three years.  Now, based on the five leadership profiles below, consider each accomplishment in light of the leadership you demonstrated:

   a. DD: *Data Driven Leadership* – you discovered an issue, you created a project plan with outcomes and timeframes and then, collected data around possible solutions.  Based on the data, you were able to successfully resolve this issue.
   b. F: *Focused on Outcomes Leadership* – you discovered or were handed an issue, you quickly determined a sound solution and you moved successfully to resolve this issue quickly.

c. O: *Outside the Box Leadership* – you discovered or were handed an issue. Gathering data and talking to experts in and outside the field, you determined an innovative solution and moved successfully to resolve this issue in a timely manner.

d. C: *Collaborative Leadership*: you discovered or were handed an issue. You identified all the stakeholders and held focus groups with community members and with the key stakeholder. Together, you identified solutions and together, you moved to a solution based on widespread collaboration.

e. TI: *Transformative Integrative Leadership:* you have an issue and using all of the above leadership approaches, you collectively create a solution that transforms the immediate issue into a widespread, value-added enhancement for the network and the wider community. The solution can be successfully replicated in other networks.

As you consider the leadership model below, think about your three accomplishments and determine the leadership approach. Note these three accomplishments on the appropriate model below.

| ⟷ | ⟷ | ⟷ | ⟷ | ⟷ |
|---|---|---|---|---|
| | | | | |
| *DD: Data Driven Leader* | *F: Focused on Outcomes* | *O: Outside the Box Leader* | *C: Collaborative Leader* | *TI: Transformative Integrative* |

# 5. Questions to Consider

Approach:  Identify 30 minutes of uninterrupted time for the next 4 weeks.
Consider the following questions and think about where there is alignment with your values and your commitments and where an opportunity for creative growth emerges.  Write no more than three paragraphs for each question:

## Week 1

What is my personal leadership vision?  What does it look like?  This vision should include consideration of your values and your preference and commitments for change:

**Leadership Vision:**

_____

_____

_____

_____

_____

_____

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_____

_____

_____

_____

_____

## Week 2

How do I keep my leadership self-awareness accessible and well tuned?
Remaining Current:

_____

_____

_____


What specifically needs deeper exploration?
 Additional Exploration:

_____

_____

_____


## Week 3

How can I be more engaged with my own leadership development?
Additional Engagement:

_____

_____

_____


## Week 4

How will I measure my success and celebrate my wins?

_____

_____

_____


Metrics of Success & Opportunities for Celebration:

- _____

- _____

- _____

# 6. Action
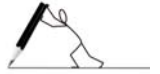
Move to your Personal Leadership Development Plan (PLDP) (p. 91).  In this Unit, you begin to integrate the leadership approaches you have considered so far.

| Key Leadership Commitments (Unit 4) | Competing Commitments (Unit 2) | Resolution/Action Plan | Date | Recheck |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Transfer this assessment to your PLDP and note the dates for action in your schedule.

# Unit 6

**Personal Leadership Goals & Measurements**
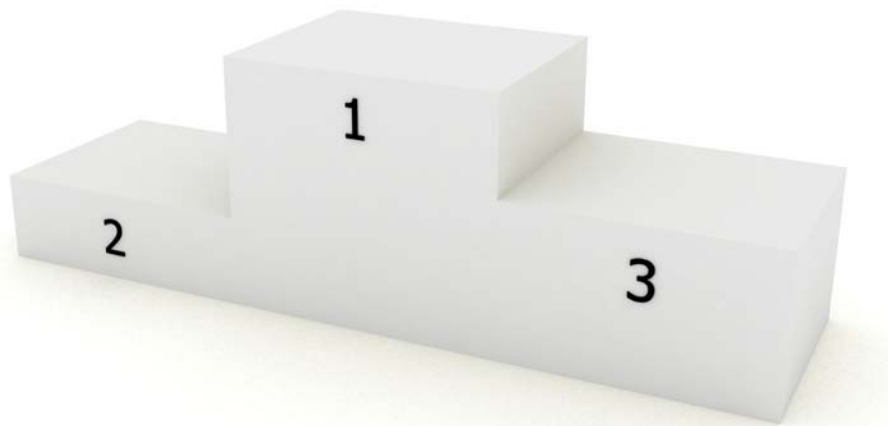
# 1. Leadership Purpose

Declaring your leadership goals and determining how to measure your progress in meeting these goals.

# 2. Learning Objectives

- Determining Metrics
- Communication Approaches
- Personal Development

# 3. Resources

- *Working with Emotional Intelligence* by Daniel Goleman (Bantam, 1998), talks about his findings from studies of over 500 organizations.   He has determined that emotional intelligence is the most important factor for outstanding performance.  Emotional intelligence combines insight into self-awareness, self-confidence, integrity and effective communication.

- Add one additional resource:

  _____

  _____

  _____

# Goals

Often, an unobstructed leadership path simply doesn't exist.  You may not have a concise idea of where you may live in the near future, what opportunities may exist in six months and how your competing commitments might reconcile.  You can create meaningful goals to engage with and support your overall vision and your values. Because you are the author of this section, allow yourself to be inspired with this exploration of your goals.

Review the first four Units of your Personal Leadership Development Plan (PLDP) and then begin to create or recreate your personal Leadership Goals.  In addition to setting your goals, describe your strategy to reach each goal. Then, outline how you know you are moving to success by completing the section under each goal entitled, "evidence of accomplishment" which is another phrase for measuring your progress.

### I. Identify and define Goal 1: Describe in no more than 2 paragraphs why this is important.

Description (no more than 2 paragraphs on "why"):

_____

_____

_____

_____

Strategy:

   *Example:  Consistent verbal communication (I will call people)*

- _____

- _____

- _____

Evidence of Accomplishment:

- _____

- _____

- _____

## II. Identify and define Goal 2.

Description (no more than 2 paragraphs on "why")

_____

_____

_____

_____

_____

_____

_____

_____

Strategy:

- _____

- _____

- _____

- _____

Evidence of Accomplishment:

- _____

- _____

- _____

- _____

## III. Identify and define Goal 3

Description (no more than 2 paragraphs on "why")

_____

_____

_____

_____

_____

_____

_____

_____

Strategy:

- _____

- _____

- _____

- _____

Evidence of Accomplishment:

- _____

- _____

- _____

- _____

# 4. Questions

Approach: Block out 30 minutes of uninterrupted time over the next two weeks. Consider these questions and allow yourself to "roam the planet" for answers! You have no constraints in this section, allow yourself to dream.

## Week 1

Stretch Goals or Audacious Leadership Goals: What is possible in 5-7 years?

1. _____
   _____
   _____
   _____
   _____
   _____

2. _____
   _____
   _____
   _____
   _____
   _____

3. _____
   _____
   _____
   _____
   _____
   _____

# Week 2

Networks, Organizations and Leaders that inspire me.  I can see myself talking with these entities for inspiration and continued leadership growth.  And yes, set a date for taking action.  The date can be two years from now:

Who/What                                                                                  When

1. _____                    _____

2. _____                    _____

3. _____                    _____

4. _____                    _____

5. _____                    _____

6. _____                    _____

7. _____                    _____

8. _____                    _____

9. _____                    _____

## 6. Action

Complete the following summary and add this to Personal Leadership Development Plan (PLDP) (p. 92).

## Targeted Leadership Development (Unit 5)

| | Goal | Strategy | Evidence of Accomplishment | Date for next Review |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |

4. And, here is what I am taking off my plate: _____

   Here is the date I will no longer engage with this work: _____

# Unit 7

## Board Development, Accountability & Participation

## 1. Leadership Purpose

Clarity around the roles, goals and accountability of the Network Leader and the Board are healthy, efficient, and represent sound business practices.

## 2. Learning Objectives

- Determining Sound Borders
- Communication Approaches
- Alignment

## 3. Resources

- *Images of Organization, The Executive Edition* by Gareth Morgan (Berrett-Koehler, 1998) provides a comprehensive overview and examples of the organizational systems: healthy and unhealthy systems. This approach to understanding organizations through metaphors supports new and healthy approaches to work in complex situations.

- Add one additional resource:

_____

_____

_____

# 4. Experience

**Alignment**

(Reference: Heman Marshall's presentation, 2011 NCHN Leadership Summit, September 27, 2011)

It is critical to understand the role of boards as distinct from the role of the Executive Director. There will be a detailed presentation, handouts and an opportunity for questions.

Borders of rocks or fencing keep livestock from roaming into the neighboring field. Guardrails are an effective means of alerting us to remain on the designated roadway. In any relationship, articulated boundaries tend to keep vitality, health and vigor alive. It is critical to take time to define the explicit and distinct roles of boards and network leaders. Any misalignment or gaps require action plans.

**Come to the meeting prepared with the following information if possible. If you do not have these documents, create notes prior to the meeting on specific questions you have for each area:**

☐ Job Descriptions of your Board positions:

_____

_____

☐ Job Description of the Executive Director:

_____

_____

☐ Bylaws:

_____

_____

☐ Board Goals and Measures of Success/Balanced Scorecard:

_____

_____

☐ Goals of the Executive Director and Measures of Success:

_____

_____

## 5. Questions

Approach:  Block out 30 minutes of uninterrupted time over the next two weeks.

## Week 1

What key information will I communicate to the Board around distinct responsibilities and goals of the Board and the Executive Director based on the presentation in Kansas City, Missouri?

1.  _____

    _____

    _____

    _____

2.  _____

    _____

    _____

    _____

3.  _____

    _____

    _____

    _____

# Week 2

- What are the major goals and deliverables of the network board?
  Example:  development (dollars and timeframes)

  _____

  _____

  _____

  _____

  _____

  _____


- How does the network board assign responsibility for these goals and consistently measure
  progress in meeting these goals?

  _____

  _____

  _____

  _____

  _____

  _____

# Week 3

- What are my major goals and deliverables as the network leader?

  _____

  _____

  _____

  _____

  _____

- How do I as the network leader consistently report progress on these goals to the network board?

  _____

  _____

  _____

  _____

  _____

- Are we duplicating work?  What isn't being accomplished?

  _____

  _____

  _____

  _____

  _____

# Week 4

- What steps should I take as a leader to address any inconsistencies, gaps or duplications?
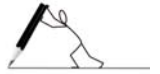
_____

_____

_____

_____

_____

_____

- What documents and approaches must be developed to clearly define the role of the Executive Director and when should this work be completed?

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

# 6. Action

Appropriate alignment of the duties of the Board and the Network or Organizational Leader is critical. There should be quarterly reviews between the two parties to ensure alignment as the environment is in a great deal of change.  Complete the following summary and add this to your Personal Leadership Development Plan (PLDP) (p. 93):

- I am delegating these projects to the Board:

  <u>Item</u>                                           <u>Date</u>            <u>Result</u>
  *Example:  Board Job Descriptions*            *Q1*             *Board clarity and greater buy-in*

  1. _____        _____     _____

  2. _____        _____     _____

  3. _____        _____     _____

- I am accepting these projects from the Board:

  <u>Item</u>                                           <u>Date</u>            <u>Result</u>
  *Example:  Managing daily operations*          *Q1*             *Board clarity and greater buy-in*

  1. _____        _____     _____

  2. _____        _____     _____

  3. _____        _____     _____

# Unit 8

## Successful Planning for Leaders

# 1. Leadership Purpose

Understanding both your preferred leadership approach and what you may be interested in moving toward and exploring.

# 2. Learning Objectives

- Stakeholder Assessment
- Momentum on Goals
- Personal Awareness

# 3. Resources

- Margaret J. Wheatley wrote *Leadership and the New Science:  Discovering Order in a Chaotic World* (Berrett-Koehler, 1999) to accomplish just what her title indicates.  We live in chaos and yet, there is order in this chaos and we can lead if we allow ourselves curiosity, expansive thinking, conversations with others and new ways of reflecting and taking action.

- Add one additional resource:

_____

_____

_____

# 4. Experience

Succession planning is a critical planning goal for any network or organization.  Even in networks with few employees, succession planning is critical - for the network leader and for the board members. Leaders should have a current job description and the Board should review this description yearly in line with the strategic plan.

Performance reviews of the network leader by the Board should optimally occur quarterly in the form of coaching for the next quarter.  Having a personal coach or being a member of peer coaching is another approach to engaging thoughtfully with the present economic realities.

Once a year, within 30 days of the close of the fiscal year, the Board provides the Leader a written evaluation based on agreed upon goals and outlines strategic goals and metrics for the next year.  The job description and salary are also reviewed at the end of the year.  In this way, the Board remains current with the work of the Leader and retains talented leadership.   The Board should also complete and review the succession-planning document for the organization yearly including the board positions and the position of the Executive Director and staff.

**Succession Plan**

| Position Title | Required Competencies | Successor Secured | Potential Successor | Readiness | Training/ Date |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## 5. Questions to Consider: Succession Planning

Time required:  30 minutes each week for the next four weeks.

Approach:  Identify 30 minutes on your calendar to respond to the designated question

This should be uninterrupted time and avoid checking email.  This is "real" work.

## Week 1

We don't normally have time to think about succession planning.  And yet, most of us are very responsible and responsive leaders.  One fact to consider is that you may not want to remain at this job forever.  You may discover through this process that your leadership is more productive and satisfying in another venue.  The truth is that organizations, networks and leaders are changing constantly whether we recognize this or not.  This section serves to increase your awareness of these changes and to inject "choice" and "awareness" into the process for your health and the health of your network.

For the next seven days, jot down in your calendar or in the "note" section of your phone/technology a position or role you always wanted to hold.  There are no constraints to this process and list as many things as you can think of.  Yes, President of a playhouse or historic society, head of Fannie Mae, a Supreme Court Judge, an actor of your choice, the Provost of University of Virginia, or any other role that stirs your imagination.  And yes, this can also be your current role!

- Day 1: _____

- Day 2: _____

- Day 3: _____

- Day 4: _____

- Day 5: _____

- Day 6: _____

- Day 7: _____

## Week 2

In three paragraphs, I am telling the story of a new dream position I am holding and I describe what surprises me as I tell the story of my new role.

_____

_____

_____

_____

_____

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# Week 3

Look back at Week 2. Add three more paragraphs:  What is holding me back from what I believe I would enjoy in this new role?

_____

_____

_____

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# Week 4

- If this chance for this wild new role came along tomorrow, what would your Board and staff and key stakeholders need to know about your current role, workload and pressing issues within 24 hours?

    1. _____

    2. _____

    3. _____

- What competencies are key for your role?

    1. _____

    2. _____

    3. _____

- What training is needed?

    1. _____

    2. _____

    3. _____

- Are you training your successor?
    - ☐ Yes
    - ☐ No and I will start on _____

- If you have staff, complete the same assessment for their role.

# Week 4: Staff Assessments

**Position: _____**

- If this chance for this wild new role came along tomorrow, what would your Board and staff and key stakeholders need to know about this staff person's current role, workload and pressing issues within 24 hours?
  1. _____
  2. _____
- What competencies are key for your role?
  1. _____
  2. _____
- What training is needed?
  1. _____
  2. _____
- Are you training your successor?
  - ☐ Yes
  - ☐ No and I will start on _____

**Position: _____**

- If this chance for this wild new role came along tomorrow, what would your Board and staff and key stakeholders need to know about this staff person's current role, workload and pressing issues within 24 hours?
  1. _____
  2. _____
- What competencies are key for your role?
  1. _____
  2. _____
- What training is needed?
  1. _____
  2. _____
- Are you training your successor?
  - ☐ Yes
  - ☐ No and I will start on _____

# 6. Action
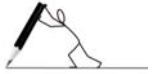
Complete the succession plan below and add it to your Personal Leadership Development Plan (PLDP): My Leadership Succession Planning (p. 94).

My Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    My Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

# Unit 9

**Branding: How Others See Me**

# 1. Leadership Purpose

Understanding how we are viewed as leaders to support our continued growth.

# 2. Learning Objectives

- Strategic
- Communication Approaches
- Personal Mastery

# 3. Resources

- The September, 2011 issue of Harvard Business Review has an article by Pierre Omidyar on, *EBay's Founder on Innovating the Business Model of Social Change.* This interview sheds light on social media and hybrid models for structuring non-profits.

- Add one additional resource:

  _____

  _____

  _____

## 4. Experience

We are probably all familiar with, "Just Do It".  Xerox is, "Ready for Real Business".  Chevron is all about, "Human Energy".   When you think of certain companies, their brand is so intertwined with their name that an image or feeling comes immediately to mind.  They have done a great job with "branding".

Are you aware that you, as a leader, also carry a unique brand? Branding represents an external assessment of your leadership traits and skills.  In this branding approach, you receive specific and targeted feedback from your colleagues in the NCHN Leadership Learning Community.

When we are face-to-face at the 2012 NCHN Annual Conference, we will explore this topic more deeply.

- List all the words your colleagues gave you.  Be as creative as you want with this listing – create a collage here, surround a photo with your leadership traits.  Think about how, "Just Do It" resonates with all of us. This is the power of a leadership brand.

_____

_____

_____

_____

- What did I learn from this interactive process?  Does this feedback modify my leadership vision (Unit 3)?

_____

_____

_____

_____

## 5. Questions to Consider

Branding Me; Branding my Organization

Time required:  30 minutes each week for the next 3 weeks.

Approach:  Identify 30 minutes on your calendar to respond to the designated question

This should be uninterrupted time and avoid checking email.  This is "real" work.

## Week 1

Be aware all week of company and organizational "brands".  When you arrive at this session, jot down the company, the brand, and the response you personally have to this brand.

| Company | Brand | What is my response? |
|---------|-------|----------------------|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |
| 3. _____ | _____ | _____ |

## Week 2

In Unit 2, Question 5 (p. 17), you told the story of a mentor.  Now, think of your mentor in terms of their brand and use one word or phrases to create a "brand" for this individual.

1. _____

_____

_____

_____

2. _____

_____

_____

_____

3. _____

_____

_____

_____

4. _____

_____

_____

_____

# Week 3

(Continued from Week 2) And, if you were to brand your current organization, what emerges?

1. _____

   _____

   _____

   _____

2. _____

   _____

   _____

   _____

3. _____

   _____

   _____

   _____

4. _____

   _____

   _____

   _____

# 6. Action

Document this in your Personal Leadership Development Plan (PLDP) (p. 95).

My Brand is:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

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## NOTES

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# Unit 10

## Best Leadership & Organizational Practices

# 1. Leadership Purpose

Understanding best practices for continued leadership growth is critical for engaging successfully in chaos.

# 2. Learning Objectives

- Strategic Thinking
- Communication Approaches
- Personal Mastery

# 3. Resources

- The September 2011 of Harvard Business Review has an article by two long-term observers of healthcare:  Robert S. Kaplan and Michael E. Porter.  They ask you to consider, *Three Myths About Health Care Exploded*.  Doesn't the title edge into your curiosity about what they may have discovered?

- Add one additional resource:

  _____

  _____

  _____

# 4. Experience

As a curious leader, you are exposed to creative ideas and approaches constantly.  In many ways, this information is like drinking from a fire hydrant.

This section allows you to be very deliberate in choosing "best practices".  At the same time, this practice of collecting ideas in one location allows you to experience adaptive leadership.

Every three months, take a look at the ideas you have collected and determine trends and patterns.  At the end of the year, this section becomes a source of leadership and organizational intelligence for you as you update your goals and continue your leadership growth.

Select some central location and keep tabs on the following information for three months:

**Leadership Practices**

| Potential Outcome: | My  Action: | Date of next Review: |
|---|---|---|
| 1. _____ | _____ | _____ |
| 2. _____ | _____ | _____ |

**Intriguing Network Practices**

1. _____

2. _____

**Opportunities I Discovered**

1. _____

2. _____

**Books**

_____    _____

**Training**

_____    _____

## 5. Questions to Consider

Best Leadership & Organizational Practices

Time required:  30 minutes each week for the next 2 weeks.

Approach:  Identify 30 minutes on your calendar to respond to the designated questions.  For these three weeks, you may need special supplies.

## Week 1

What "best practice" have I discovered around leadership?

Hand-write a thank you note to the individual that demonstrated or shared this with you.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

## Week 2

Where have you discovered an organization with "best practices"?

Hand write a thank you note to the board chair and be explicit about your observation.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

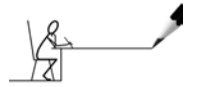# 6. Action

Document your Best Leadership Practices in your Personal Leadership Development Plan (PLDP) (p. 96).

## NOTES

_____

_____

_____

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_____
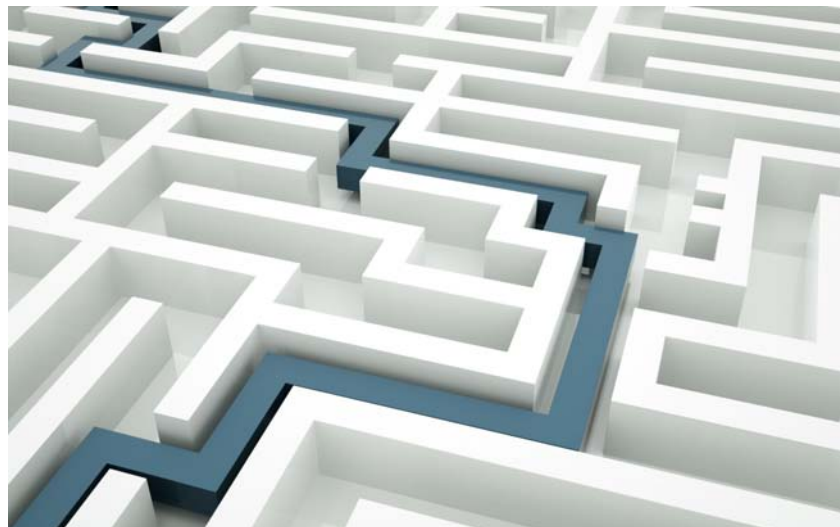
_____

_____

_____

## DOODLES

# Appendix A

**Personal Leadership Development Plan (PLDP)**

# Summary Unit:  Personal Leadership Development Plan

This is a summary of the key leadership decisions you made during the months spent exploring your leadership preferences.  There is a saying that, "practice makes perfect".  You are encouraged to create very specific and uninterrupted time on your schedule to review this plan in three months, six months and then, twelve months.  You may find it very beneficial to create additional time at the end of the year to revisit each Unit and update your preferences.  You will most likely discover that your participation in the NCHN Leadership Learning Community accelerated your leadership growth and you are now ready for new goals and targets.

## Vision

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

# Effective and Innovative Facilitation

From the On-line Assessment, my personal preferences and an overview of the meaning of each preference:

1. _____

_____

_____

_____

_____

2. _____

_____

_____

_____

_____

3. _____

_____

_____

_____

_____

4. _____

_____

_____

_____

_____

# Facilitation Goal 1

My first facilitation goal for 45 days is:

**Description of facilitation goal**

_____

_____

_____

_____

_____

_____

_____

Current Rating (1 is excellent and 5 means I need to really build my capacity here): _____

Date of Current Rating: \_\_\_\_/\_\_\_\_/_____

**Examples of what I am learning**

_____

_____

_____

_____

_____

_____

_____

Rating 45 days later: _____

Date of Later Rating: \_\_\_\_/\_\_\_\_/_____

# Facilitation Goal 2

My second facilitation goal for 45 days is:

**Description of facilitation goal**

_____

_____

_____

_____

_____

_____

_____

Current Rating (1 is excellent and 5 means I need to really build my capacity here): _____

Date of Current Rating: ____/____/_____

**Examples of what I am learning**

_____

_____

_____

_____

_____

_____

_____

Rating 45 days later: _____

Date of Later Rating: ____/____/_____

# My Preferred Communication Style

My preferred communication style is: _____

I am experimenting with _____
to provide better connection with the following stakeholders:

- _____
- _____
- _____
- _____

# Values

**VALUE:** _____

Definition: _____

_____

_____

Example of Growth

3 mo.: _____

6 mo.: _____

12 mo.: _____

**VALUE:** _____

Definition: _____

_____

_____

Example of Growth

3 mo.: _____

6 mo.: _____

12 mo.: _____

**VALUE:** _____

Definition: _____

_____

_____

Example of Growth

3 mo.: _____

6 mo.: _____

12 mo.: _____

# Change & Change Tools: Leadership Strategy

My leadership strategy for change is:

_____

_____

_____

_____

_____

_____

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_____

_____

_____

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_____

_____

_____

# Leadership Preferences & Sustainability Plan

| Key Leadership Commitments (Unit 4) | Competing Commitments (Unit 2) | Resolution/Action Plan | Date | Recheck |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Targeted Leadership Development

|  | Goal | Strategy | Evidence of Accomplishment | Date for next Review |
|---|---|---|---|---|
| 1. | | | | |
| 2. | | | | |
| 3. | | | | |

4. And, here is what I am taking off my plate: _____

   Here is the date I will no longer engage with this work: _____

# Board & Network Leader Accountabilities

- I am delegating these projects to the Board:

  | Item | Date | Result |
  |------|------|--------|
  | *Example: Board Job Descriptions* | *Q1* | *Board clarity and greater buy-in* |

  1. _____  _____  _____

  2. _____  _____  _____

  3. _____  _____  _____

- I am accepting these projects from the Board:

  | Item | Date | Result |
  |------|------|--------|
  | *Example: Managing daily operations* | *Q1* | *Board clarity and greater buy-in* |

  1. _____  _____  _____

  2. _____  _____  _____

  3. _____  _____  _____

# My Leadership Succession Planning

My Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    My Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

Title: _____

    Competencies: _____

    Growth Goals: _____

    Our Training/Dates: _____

    Successor: _____

# My Leadership Brand

My Brand is:

_____

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# Best Leadership Practices in Networks

Contacts I will make for best practices and the date to accomplish these contacts:

Q2: Who: _____

        Subject: _____

        Personal or Organizational Goal: _____

        Date: _____

Q3: Who: _____

        Subject: _____

        Personal or Organizational Goal: _____

        Date: _____

Q4: Who: _____

        Subject: _____

        Personal or Organizational Goal: _____

        Date: _____

# Appendix B

**Personal Leadership Resources**

# References

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