Leadership Journey: Learning Journal and Workbook

Learning Journal for Leadership Development
Health Leadership and Management for the Poor Program
Module TWO: Moving From Good To Better
# Table of Contents

Your Module Two Leadership Journal  
Introduction  
Bridging Leadership Framework: Review  
Ownership: Technical And Adaptive Leadership Challenges  
Ownership: Deepening Personal Awareness  
Ownership: Story of Self, Us and Now  
Co-ownership: Deepening Dialogue Skills  
Co-ownership: Understanding Group and Group Dynamics  
Co-ownership: Leader as Coach  
Co-Ownership: Kotter’s 8-Step Change Model  
Co-Creation: Action Planning
Your Module Two Leadership Journal and Workbook

The Learning Journal and Workbook contains session notes, worksheets and reflection questions for each session. The session notes are summaries of the topics discussed and worksheets are for individual exercises used in some of the sessions. The reflection questions are designed to capture what you have learned and to stimulate your thoughts and feelings.

Within each individual lies extraordinary potential – if only we discover and accept who we really are.

There are no rules for using this Learning Journal and Workbook, except for the Worksheets which will have instructions for use. You can freely write or draw on the pages as you wish. If you don’t like a question, ask your own questions.

As you work, take the time to be still and listen inside. You have an inner voice which is your best teacher. You will hear the lessons as they resonate in your being. As you begin to heed the inner voice, you will see possibilities you could never have imagined.
Introduction

Health Leadership and Management for the Poor

The main problem of the Philippine health care system is and has been the inequities among its population. The system is biased against the poor in terms of physical and financial access to appropriate health care, even to basic health care. Therefore, the poor becomes vulnerable to sickness and death.

Targeting health improvement for the poor and the community, therefore, will improve significantly health outcomes not only of the local community but the whole country as well.

Health services for all especially for the poor will likely improve if the key health stakeholders are motivated and trained to do so.

In this light, Zuellig Family Foundation (ZFF) envisions itself to be a catalyst for the achievement of better health outcomes for the poor through sustainable healthcare programs and services [universal coverage, people-centered health service delivery, public policy, and leadership and governance], with a primary focus on health inequities in the rural areas in the Philippines. With this end in mind, ZFF implements The Health Leadership and Management for the Poor (HLMP) in partnership with the Department of Health and its Regional Offices. The program aims to enhance the technical and leadership capacities of DOH Regional Office personnel as well as the academic partners to effectively and efficiently support the provincial and municipal health leaders.

HLMP aims to facilitate transition from old arrangements, both at the level of the personal and the community, in relation to one’s involvement in the health sector as a leader, as well as in helping achieve better health outcomes for the community, especially the poor, through effective leadership and management of local health systems. HLMP is a two (2) module, 12-month program that incorporates classroom sessions and fieldwork for key stakeholders working as convergence teams anchored on Bridging Leadership and multi-stakeholder engagement. It is based on the ZFF Health Change Model for achieving MDGs for health.
OPERATIONAL FRAMEWORK: Health Change Model

KEYRA RESULT AREAS
- Leadership
- Improved Leadership

SUSTAINABILITY INDICATORS
- Effective Leaders
  - Local Chief Executives
  - Community Leaders
  - Public Health Leaders

IMMEDIATE OUTCOMES
- Improved Local Health System
- Improved Health Governance
- Increased Community Participation
- Effective Health Service Delivery

INTERMEDIATE OUTCOME
- Local Health Outcome
- Better Local Health Outcomes

IMPACT
- Lower Maternal & Infant Mortality Rates
- Lower Malnutrition Prevalence Rate
- Lower Incidences of Infectious and Non-Communicable Diseases

ATTAINMENT OF THE COUNTRY'S MILLENNIUM DEVELOPMENT GOALS ON HEALTH
- Competent Human Resource
- Improved Access to Medicines & Technologies
- Appropriate Health Information Systems
- Appropriate Basic Health Services
- Appropriate Innovative Health Programs
- Responsive Citizens on Health Programs
- Better Health Seeking Behavior
- Effective Barangay System
- Functional Local Health Board
- Sound Health Policies
- Adequate Health Financing
- Adequate Human Resource
Objectives of the Health Leadership and Management for the Poor Program

After having successfully undertaken the 12 month HLMP Program, the HLMP Fellows are expected to:

1. Have demonstrated the knowledge, skills and attributes of a Bridging Leader (months 1-12).

2. Have supported the cohort municipalities by accomplishing the final committed deliverables as indicated in their individual and municipal work plans.

3. Have started preparatory work towards institutionalization of the Health Change Model in their organization or areas of operation reflected in their organization’s policy, budget and work plan for the next year.
Bridging Leadership Competencies:

At the end of the course, the following Bridging Leadership Competencies would have been developed:

**OWNERSHIP**

1. **Self-Awareness:** Is conscious about strengths and limitations; is able to articulate where his/her leadership, values and beliefs are coming from.

2. **Understanding of Health Challenges (Content Mastery):** Able to identify priority issues and interrelationships of causes and effects of the issues.

3. **Vision:** Takes a long-term view and builds a shared vision with others; acts as a catalyst for organization

4. **Change Mastery:** Able to identify and respond to adaptive leadership challenges.

5. **Resilience:** Deals effectively with pressure; remains optimistic and persistent even under adversity; recovers quickly from setbacks.

**CO-OWNERSHIP**

6. **Multi-stakeholder Processes (Dialogue):** Able to create a space where people can come together to build mutual understanding and trust across their differences, and to create positive outcomes.

7. **Team Development/Team Work (Interpersonal):** Works well with people; builds trust within the team; manages and influences people to work well together in pursuit of common goals.

8. **Coaching & Mentoring:** Provides guidance and support to his/her team members and facilitates his or her personal development.

9. **Conflict Management:** Explores differences and understanding of another’s perspective; facilitates surfacing, discussion and resolution of differences within the team.
CO-CREATION

10. **Creativity & Innovation:** Develops new insights into situations; questions conventional approaches; Encourages new ideas and innovations, designs and implements new or cutting edge programs/processes.

11. **Networking, Partnership Development & Coalition Building:** Able to analyze stakeholders and interests and identify stakeholders that will pursue his/her goals and objectives in partnership, network or coalition.

12. **Resource Mobilization:** Able to generate resources to support programs and services.
Objectives of Module Two: Moving From Good To Better

By the end of the module, the HLMP Fellows will be able to:

1. Deepen personal purpose and heighten leadership role;
2. Heighten self-awareness for personal mastery and Leadership
3. Appreciate strategies on communicating health gains;
4. Adapt dialogue as a skill in dealing and understanding stakeholders; and,
5. Develop a Continuity Plan and Leadership Development Plan.
My Leadership Experience

Name ___________________________________  Date ______________________

Reflection Questions

Looking back at the last six months, my most memorable and significant experience as a member of the Health Leadership Team is/are:

This experience is important to me because:
**Worksheet No. 1 - Report Back:** Using your current data, color each box of outcome with Green if it is 100% accomplished, Yellow if it's more than 50% accomplished. Red if it is below 50% accomplished.

<table>
<thead>
<tr>
<th>Municipal Basic Health System’s Technical Roadmap</th>
<th>Health Service Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership &amp; Governance</strong></td>
<td><strong>Presence of Barangay Health Stations</strong> (1 DHIS.1 + Barangay or 1 DHIS per Catchment)</td>
</tr>
<tr>
<td>Municipal Health Action Plan</td>
<td>Maintenance and Operations</td>
</tr>
<tr>
<td>Barangay Health Governance</td>
<td><strong>Utilization</strong></td>
</tr>
<tr>
<td></td>
<td>Available Transportation for Emergency</td>
</tr>
<tr>
<td><strong>Health Financing</strong></td>
<td><strong>Sustainable Maternal Health Care Initiatives</strong></td>
</tr>
<tr>
<td>LGU Budget for Health (15% BDA)</td>
<td>Pro-Natal Services (at least 80%)</td>
</tr>
<tr>
<td>Actual budget utilization (95% Utilization)</td>
<td>Facility-Based Develies (55%)</td>
</tr>
<tr>
<td>BLGU Health Budget (5% of barangay IRA)</td>
<td>Skilled Birth Attendants (55%)</td>
</tr>
<tr>
<td><strong>Health Human Resource</strong></td>
<td><strong>Sustainable Breastfeeding Initiatives</strong></td>
</tr>
<tr>
<td>Health Human Resource Adequacy at the RHU (Midwife 1 per 10,000, Health Worker 1 per 6,000, Nurse 1 per 1,000)</td>
<td>Newborns initiated Breastfeeding (85%)</td>
</tr>
<tr>
<td>RHU HHRI Competency</td>
<td><strong>Sustainable Essential Intrapartum and Newborn Care Initiatives</strong></td>
</tr>
<tr>
<td><strong>Access to Medicine &amp; Technology</strong></td>
<td><strong>Sustainable Breastfeeding Initiatives</strong></td>
</tr>
<tr>
<td>Full implementation of Magna Carta for Public Health Workers</td>
<td>Exclusive Breastfeeding for infants (70%)</td>
</tr>
<tr>
<td>Installed performance Management System</td>
<td><strong>Sustainable Breastfeeding Initiatives</strong></td>
</tr>
<tr>
<td><strong>Health Information System</strong></td>
<td>Under-5 Mortality Prevalence Rate (below 17.5%)</td>
</tr>
<tr>
<td>Presence of Essential Medicine at the RHU (Stock Basis)</td>
<td><strong>Sustainable Adolescent Reproductive Health Initiatives</strong></td>
</tr>
<tr>
<td><strong>Drug Management System</strong></td>
<td><strong>Sustainable Family Planning Initiatives</strong></td>
</tr>
<tr>
<td>RHU Medicine tracking and Inventory System</td>
<td>Provision of FP Commodities and Services (80%)</td>
</tr>
<tr>
<td><strong>Data Collection, Utilization and Information Dissemination</strong></td>
<td>Contraceptive Prevalence Rate (80%)</td>
</tr>
<tr>
<td>Maternal/InfantDeath Review</td>
<td>Unmet Needs (50% under NHTS)</td>
</tr>
<tr>
<td>Monthly Updated Health Data Board</td>
<td><strong>Water</strong></td>
</tr>
<tr>
<td><strong>Health Service Delivery</strong></td>
<td><strong>Sanitary Toilets (60%)</strong></td>
</tr>
<tr>
<td>Accomplishment, Utilization and Dissemination of the DODC, DOH-LGU Scorecards</td>
<td>Access to Safe Water (87% of HH)</td>
</tr>
</tbody>
</table>

- Municipal Health Action Plan
- Expanded and Functional Local Health Board
- Functional Barangay Health Governance Body (with functional CMT)
- Barangay Health Governance
- Local Health Administration
- Reimbursement (PCS, MCP, TR-DOTs)
- Ordinance and System for claims Disposition and Utilization Monitoring

10 | Page
REPORT BACK WORKSHEET

(What are the activities/interventions done for each building block or area by each health leader for the past 6-12 months and what health outcomes or indicators have been affected/improved by these interventions?)

<table>
<thead>
<tr>
<th>BUILDING BLOCKS OF A LOCAL HEALTH SYSTEM</th>
<th>CONTRIBUTION</th>
<th>HEALTH OUTCOME (INDICATOR)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DOH REPRESENTATIVE</td>
<td>MAYOR</td>
</tr>
<tr>
<td>Health Human Resource</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Service Delivery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access To Medicines and Medical Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Financing</td>
<td></td>
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<tr>
<td>-----------------</td>
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</tr>
<tr>
<td>Health Information System</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Leadership and Governance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What remaining challenges or issues are yet to be addressed?</td>
<td>What have been done to start addressing these challenges? What other strategies or interventions do the health team need to implement?</td>
<td>Who are the stakeholders needed to be engaged in order to address these challenges?</td>
</tr>
<tr>
<td>---</td>
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<td>---</td>
</tr>
<tr>
<td>1.</td>
<td>2.</td>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
<td>5.</td>
<td>6.</td>
</tr>
</tbody>
</table>
The Bridging Leadership Framework: A Review

The Need for a Leadership Approach to Address Social Inequities

The Bridging leader, whose values and principles compel him to make a personal response to address inequities and societal divides, recognizes that the complexity of the problem can only be solved by convening the stakeholders to the divide.
Leader: Refers to a person who has influence over a group, either through formal or informal arrangements.

Bridge: Root word “leith”
- To go forward
- To cross the threshold
- Towards the light

\[\text{Implies an act of bridging divides}\]

**Bridging Leadership** is a leadership approach for addressing **Health Inequities**
- Beyond the capacity of one sector alone to resolve
- Needs collaborative action of all three sectors – government, private sector, and civil society
- Resolutions to social issues must be shared by the multi-stakeholders
- Need for bridging leaders to bring diverse stakeholders to own the issue and its resolution.

Bridging Leadership consists of **Ownership, Co-Ownership and Co-Creation**.

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**The Bridging Leadership Process**

**OWNERSHIP**
- Bridging Leader
- Health Inequity/Divide and Stakeholders
- Personal Vision & Mission

**CO-OWNERSHIP**
- Engagement Mechanisms
- Multi-Stakeholder Processes/Convening and Trust-Building Dialogue
- Shared Vision & Mission
- Collaborative Response
- New Relationships Among Stakeholders

**CO-CREATION**
- Empowered Citizenry
- Responsive Programs and Services/Social Innovations
- Health Equity
- Transformed Institutions

**Source: AIM-TeaM Energy Center**
The Bridging Leadership Process: Ownership

The Bridging Leader owns the issue, understands its systemic analysis and recognizes the interests of its many stakeholders. The Bridging Leader makes a personal response to the issue.

Ownership starts with the Bridging Leader developing self-awareness.

- Reflects on his/her life journey, gifts and inner divides (Life Purpose)
- The Leader owns the issue.
- Understands the systemic context of inequities (Divide)
- Makes a personal response to transform his/her reality
Ownership is a function of three things: \textit{personal values and experiences, current involvement} and \textit{societal issue}.

The leader is on his/her path when he/she is able to understand himself/herself and the issue that he/she is asked to face and this is consistent in his/her current involvement.

An individual becomes a bridging leader, when he/she takes his/her life’s purpose in addressing the issue that confronts his/her society.

\textbf{The Bridging Leadership Process: Co-Ownership}

The Bridging Leader \textit{convenes} the stakeholders of the issue. Through a process of \textit{dialogue} and \textit{engagement} the stakeholders arrive at a shared response.

Co-Ownership starts with the Bridging Leader:

- Identifying and engaging with other stakeholders through multi-stakeholder processes (\textit{Stakeholder Analysis})
- Listens and integrates the perspectives of others (\textit{Generative Dialogue})
- Facilitates space for collective reflection and ownership of the divide to come up with a collaborative response to the issue.

\begin{itemize}
  \item Engagement Mechanisms
  \item Multi-Stakeholder Processes/Convening and Trust Building
  \item New Relationships Among Stakeholders
\end{itemize}
The Bridging Leadership Process: Co-Creation

New institutional arrangements are new and innovative rules for and ways of doing things. Over time, the new arrangements that are inclusive, accountable and transparent lead to more empowered citizens and more responsive institutions.

Empowered citizens and responsive institutions, supported by new arrangements, collaborate on responsive programs and services that bring about health equity.

Co-creation is developing new institutional arrangements that are
- inclusive,
- accountable
- transparent and
- lead to more empowered citizens and more responsive institutions.
# Worksheet No. 2: The Four Fields Of Change

<table>
<thead>
<tr>
<th>PERSONAL</th>
<th>INTERPERSONAL/ RELATIONAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changes in personal assumptions,</td>
<td>Changes in relationships between people</td>
</tr>
<tr>
<td>attitudes, perspectives, or behavior</td>
<td>and how people perceive each other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ORGANIZATIONAL</th>
<th>COMMUNITY/ SOCIETY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changes in behavior, agreements, and</td>
<td>Changes in perspectives, attitudes,</td>
</tr>
<tr>
<td>arrangements within my own organization</td>
<td>behavior, and arrangements within my</td>
</tr>
<tr>
<td></td>
<td>community</td>
</tr>
</tbody>
</table>

Source: Adapted from Lederach et al.

“Each person’s task in life is to become an increasingly better person.” – Leo Tolstoy
Adaptive Leadership

Adaptability is an effective change in behavior in response to an altered situation.

Leadership (Heifetz)

- **Technical Aspect of change** – Understanding the specific actions that need to be undertaken; Knowing the solutions
- **Leadership Aspect of Change** – Working with people or groups to make decisions or change behavior for a greater good

Adaptive Work Calls for Leadership

<table>
<thead>
<tr>
<th>Leader’s Responsibilities</th>
<th>Technical or Routine</th>
<th>Adaptive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Direction</strong></td>
<td>Define problems and provide solutions</td>
<td>Identify the adaptive challenge and frame key questions and issues</td>
</tr>
<tr>
<td><strong>Protection</strong></td>
<td>Shield the organization from external threats</td>
<td>Let the organization feel external pressure within a range it can stand</td>
</tr>
<tr>
<td><strong>Orientation</strong></td>
<td>Clarify roles and responsibilities</td>
<td>Challenge current roles and resist pressure to define new roles quickly</td>
</tr>
<tr>
<td><strong>Managing Conflict</strong></td>
<td>Restore order</td>
<td>Expose conflicts or let it emerge</td>
</tr>
<tr>
<td><strong>Shaping Norms</strong></td>
<td>Maintain norms</td>
<td>Challenge unproductive norms</td>
</tr>
</tbody>
</table>
Oo na “Labas sa Ilong”

Jocano says we say “Yes” when we:

- ‘do not know’
- want to impress
- are annoyed
- want to end the conversation
- have half-understood the instructions or what is being said
- are sure of themselves
- think we know better than the one speaking

Leading thru Conversations

- Mabigat sa loob
- Napipilitan
- Labas sa ilong
- Bukas ang loob
- Maluwag sa loob
- Bukal sa loob
- Buo ang loob

ADAPTIVE CHANGE and Sustainability

- There is a gap between aspirations and reality.
- Progress requires responses outside the organization’s standard repertoire. Narrowing that gap will require difficult learning.
- Part of the learning will require distinguishing, among all that is valued, what is essential to be carried forward and what is expendable, which will involve loss.
Common Elements Of Adaptive Change

- The losses often involve learning to refashion loyalties and develop new competencies.
- Painful choices must be made between competing loyalties and values.
- The people with the problem are the problem, and they are the solution. Problem-solving responsibility must shift from authoritative experts to the stakeholders.
- Adaptive work requires a longer time frame than technical work.
- Adaptive work involves experimentation.
- Adaptive challenges generate disequilibrium, resistance and work avoidance.
Basic Toolkit Of Leading Adaptive Change

- Get off the dance floor and onto the balcony
- Think politically
- Orchestrate conflict
- Give the work back
- Hold steady

Source: Leading with an Open Heart, by Ronald Heifetz and Marty Linsky

Challenges of Adaptive Leadership

- **Get off the dance floor and onto the balcony.** Leadership is improvisational. It cannot be scripted. On one hand, to be effective a leader must respond in the moment to what is happening. On the other hand the leader must be able to step back out of the moment and assess what is happening from a wider perspective. We call it getting off the dance floor and onto the balcony. It may be an original metaphor, but it’s not an original idea. For centuries religious traditions have taught disciplines that enable a person to reflect in action. Jesuits call it contemplation in action. Hindus call it Karma Yoga, the yoga of action. We call it getting onto the balcony because that’s a metaphor people can easily relate to. But it’s critically important, and the reason why religious traditions have talked about it for so long is that it’s hard to do. You don’t need a major spiritual practice for something that’s easy to do. It’s hard, in the midst of action, to step back and ask yourself: What’s really going on here? Who are the key parties to this problem? What are the stakes they bring to this issue? How will progress require us all to reevaluate our stakes and change some of our ways?

- **Think politically.** Successful leaders in any field place an enormous emphasis on personal relationships. They spend a great deal of time and effort creating and nurturing networks of people they can call on, learn from, and work with to address the issues they face. They know that leadership is political -- it’s about motivating and mobilizing people to change. So, thinking politically is absolutely critical, not only for the person trying to lead from below or from the middle but also for those trying to lead from authority on high. Leaders need to work hard on creating allies, keeping close to the opposition, and finding ways to generate commitment from the uncommitted.
Orchestrate conflict. People don't learn by staring in the mirror. People learn by engaging with a different point of view. When people are passionate about their different points of view, it generates conflict rather than simply disagreement. Successful leaders manage conflict; they don't shy away from it or suppress it but see it as an engine of creativity and innovation. Some of the most creative ideas come out of people in conflict remaining in conversation with one another rather than flying into their own corners or staking out entrenched positions. The challenge for leaders is to develop structures and processes in which such conflicts can be orchestrated productively.

Give the work back. To meet significant challenges requiring adaptive change, people must change their hearts and minds as well as their behaviors. Leaders cannot do this for others. This is their work, and they must do it themselves. Holding people accountable for this work is not easy to do, especially when people are looking to authority for easy answers or when people are in effect asking the authority figure to lie to them by projecting more certainty than she has. Leaders who attempt to step in and take this work off the shoulders of followers risk becoming the issue themselves.

Hold steady. Confronting major change generates a great deal of conflict and resistance. Managing the conflict, dealing with the politics involved, and making people accountable requires an ability to hold steady in the heat of action. Leaders often need to refrain from immediate action and understand that the stew of conflicting views has to simmer, allowing conflicts to generate new experiments and new creative ideas. The leader's job is to contain conflict -- prevent the disequilibrium from going too high and the conflict from getting destructive -- and simultaneously to keep people addressing the hard questions without opting for a technical fix, an easy solution, or a decision from on high. In doing so, in holding steady, the leader will be the recipient of considerable frustration and even anger.

Resources:

- Leadership on the Line: Staying Alive through the Dangers of Leading, Ronald Heifetz and Marty Linsky
- The Fifth Discipline, Peter Senge
OWNERSHIP: DEEPENING PERSONAL AWARENESS

Self Awareness is having a clear perception of your personality, including strengths, weaknesses, thoughts, beliefs, motivation, and emotions. Self Awareness allows you to understand other people, how they perceive you, your attitude and your responses to them in the moment. Self awareness is a way for us to explore our individual personalities, value systems, beliefs, natural inclinations, and tendencies. Because we are all different in the way we react to things, learn, and synthesize information, it's helpful to occasionally spend time in self-reflection to gain a better insight into ourselves.

We might quickly assume that we are self aware, but it is helpful to have a relative scale for awareness. If you have ever been in an auto accident you may have experienced everything happening in slow motion and noticing details of your thought process and the event. This is a state of heightened awareness. With practice we can learn to engage these types of heightened states and see new opportunities for interpretations in our thoughts, emotions, and conversations.

Why Develop Self Awareness?

As you develop self awareness you are able to make changes in the thoughts and interpretations you make in your mind. Changing the interpretations in your mind allows you to change your emotions. Self awareness is one of the attributes of Emotional Intelligence and an important factor in achieving success.
**Self awareness** is the first step in creating what you want and mastering yourself. Where you focus your attention, your emotions, reactions, personality and behavior determine where you go in life.

Having self awareness allows you to see where your thoughts and emotions are taking you. It also allows you to see the controls of your emotions, behavior, and personality so you can make changes you want. Until you are aware in the moment of the controls to your thoughts, emotions, words, and behavior, you will have difficulty making changes in the direction of your life.

**Self Awareness in Relationships**

Relationships are easy until there is emotional turmoil. This is the same whether you are at work or in your personal life. When you can change the interpretation in your mind of what you think you can change your emotions and shift the emotional quality of your relationships. When you can change the emotions in your relationships you open up entirely new possibilities your life.

Having a clear understanding of your thought and behavior patterns helps you understand other people. This ability to empathize facilitates better personal and professional relationships.

Reflection Questions

What did I learn about myself from the exercises?

What are the discoveries about myself that I can use to improve my leadership skills?

What do I need to improve about myself?
OWNERSHIP: THE STORY OF SELF, US AND NOW

Public narrative is a practice of leadership. It is the “why” of organizing, the art of translating values into action through stories. From stories we learn how to manage ourselves, how to face difficult choices, unfamiliar situations, and uncertain outcomes, because each of us is the protagonist in our own life story, facing everyday challenges, authoring our own choices, and learning from the outcomes.

But stories not only teach us how to act – they inspire us to act.

Stories communicate our values through the language of the heart, our emotions. And it is what we feel – our hopes, our cares, our obligations – not simply what we know, that can inspire us with the courage to act.

Two Ways of Knowing: Why and How

We interpret the world in two ways – as narrative and as analysis. We develop our understanding who we are, where we are going, and why as narrative. Narrative articulates how we feel about things (affect) better than what we think about them (cognition). The “truth” of a story is in how it moves us. Psychologist Jerome Bruner argues that narrative engages us because it teaches us how to cope with uncertainty, especially with respect to others. In symbols, rituals, and celebrations, we enact shared stories. An ancient form of interpretation, this way of knowing helps us answer the question of WHY we should act – our motivation.

Analysis applies rules of critical reason and evidence to understanding data in the world. Analysis articulates what we think about things (cognition) better than how we feel about them (affect). The “truth” of analysis rests on the extent to which the data confirms or falsifies its hypotheses, as does our acceptance of the authority of those who invoke this logic. Analysis is most persuasive when it helps us achieve the outcomes we want. In organizations, we often do analytic work through deliberation, the job of many meetings. This way of knowing helps us answer the question of HOW to act – our strategy.

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1 Text and graphics taken from files.1010global.org/docs/CommunityResourcePack/Resources
Compiled by Samantha Bailey, 350.org
Knowing Why:

Emotion, Motivation, and Action

To understand motivation – that which inspires action – consider the word emotion and their shared root word, motor -- to move. Just as we map the world conceptually by noticing patterns, contrasts, and commonalities, we map the world affectively, by distinguishing bad from good from irrelevant. Information about bad and good is communicated through our emotional experience of the value that events, people and things hold for us. We use this information affectively to map the world, including our behavior.

Mobilizing Action

Which emotions inhibit action? Which emotions facilitate action? Inertia causes us to ignore signs of the need for action. Fear can paralyze, driving us to rationalize inaction. Amplified by self-doubt and isolation, we may become victims of despair.

On the other hand, urgency gets our attention, hope inspires us and, in concert with confidence and solidarity, can move us to act.

Leaders can engage people by mobilizing feelings that encourage action and challenging feelings that inhibit action. In fact, most of us hold conflicting feelings, some of which are more salient at one time than at another. Mobilizing one set of feelings to challenge another can produce an emotional dissonance, a tension that can only be resolved through action.
Public narrative combines a story of self, a story of us, and a story of now.

The process of creating your public narrative is fluid and iterative and can start at any place. Once you develop your story of self, story of us, and story of now, you’ll want to go back to the beginning to clarify the links between them.

A “story of self” tells why we have been called to serve.

The story of self expresses the values or experiences that call each person to take leadership on climate change. The key focus is on choice points – moments in our lives when values are formed because of a need to choose in the face of great uncertainty – when we believed in and put into action our ability to make a difference. When did you first care about being heard, learn that you were concerned about health, wanted to prevent mothers from dying, wanted to ensure access to medicines, clean water for yourself and others, learn to love nature or feel inspired by social justice issues? Why? When did you feel you had to do something about it? Why did you feel you could? What were the circumstances? What specific choice did you make?

A “story of us” communicates the values and experiences that a community, organisation, group or campaign shares, and what capacity or resources that community of “us” has to accomplish its goals.

Just as with a person, the key is choice points in the life of the community and/or those moments that express the values, experiences, past challenges and resources of the community or “us” that will take action. For example, tying a current effort to win a campaign to a past campaign victory and describing the effort it took to win, the people who worked hard to make it happen, their capabilities, their values, etc. is a story of us.
A “story of now” communicates the urgent challenge we are called upon to face now and what action we are being called to take.

The story of now articulates the urgent challenge in specific detail. It also includes a description of the path we can take to achieve goals relative to the mission — the unique strategy or set of ideas that will help us to overcome the challenge we face and succeed. The story of now includes an “ask” that summons the audience to a specific action they can do to achieve our collective mission. Finally, the story lays out in detail a vision for the potential outcome we could achieve if our strategy succeeds.

**Linking Self, Us, Now**

Finally, you integrate these three stories, looking for the link between them — the place where they overlap — to help explain why you are called to this work of building a clean energy future, why we are called to act with you, and why we are called to act now. This means being very selective about the story you tell—for example not trying to tell your whole biography when you tell your story of self.

**The Three Key Elements of Public Narrative Structure:**

**Challenge – Choice – Outcome**

A plot begins with an unexpected challenge that confronts a character with an urgent need to pay attention, to make a choice, a choice for which s/he is unprepared. The choice yields an outcome -- and the outcome demonstrates the values underlying the choice and the inner resources available for dealing with challenges.
Because we can empathetically identify with the character, we can “feel” the values. We not only hear “about” someone’s courage; we can also be inspired by it. The story of the character and their effort to engage around values engages the listener in their own challenge, choice, and outcome relative to the story. Each story should include the challenge, the choice and the outcome. It’s not enough to say – I was scared. You need to say – I was very scared, I needed to decide, and when I did, I learned it was possible.

A word about challenge. Sometimes people see the word challenge and think that they need to describe the misfortunes of their lives. Keep in mind that a struggle might be one of your own choosing – a high mountain you decided to climb as much as a hole you managed to climb out of. Any number of things may have been a challenge to you and be the source of a good story to inspire others.

Also, remember the art of story telling is in the telling, not in the writing. In other words, story telling is interactive, a form of social transaction, and can therefore only be learned by telling, and listening, and telling, and listening.

Here’s an Example of a Public Narrative:

Story of Self: “I remember when I was young and my grandfather suffered from a disease called Tuberculosis. I could not tell at that time that my grandfather was sick because he didn’t look sick. For me, my grandfather was my hero, my idol. Nothing could bring him down. But then one day I was shocked to know that my grandfather died due to TB. I never knew at that time that he could die from a simple disease. What pained me more was the thought that he could have been saved if only he took some medicines to cure him of his TB. I miss my grandfather very much.”

Story of Us: “Just like me, you may know of a friend, a neighbour or even family member who is now suffering or has suffered from this same disease. Like me, you also value them as much as I valued my grandfather. TB is a curable disease. No one should be dying of TB. Especially not our friends nor family members. And yet TB is still very rampant.”

Story of Now: “I believe it is time to act now. If we really want to eliminate this deadly disease, then we must do everything that needs to be done. Let us talk about this disease. Spread the word about how those who have it can be cured. It only takes a few minutes of our time to visit the RHU and have ourselves seen by our doctor and health workers. TB can be cured. If we don’t do anything, how many more of our loved ones will die? We can save our friends and loved ones from this disease. We can eradicate this deadly disease. But there is no time. The time to act is now.”
### Worksheet 3: Linking The Three Stories

<table>
<thead>
<tr>
<th><strong>Story of Self</strong> (What are your experiences and values that call you to take the leadership on tackling the health issues of your town?)</th>
<th><strong>Story of Us</strong> (What is your reason for believing in the possibility of the people you will be speaking to? What is their story?)</th>
<th><strong>Story of Now</strong> (Why is it urgent to deal with the health situation? What is your strategy to overcome this challenge? What is the first step that each person can take to be part of your solution?)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Challenge</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Choice</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outcome</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CO-OWNERSHIP: DEEPENING DIALOGUE SKILLS

Four Practices Essential to Dialogue

Listening
- We always prepare to speak but never to listen; listening is taken for granted
- Difficult to do as we impose meaning on, or interpret in, our mind what people say
- We end up having our own interpretation

Listening together
- Allowing a “voice/meaning” to emerge from all of us
- Things we have been thinking about similarly surface naturally
- The right next steps simply becomes obvious

Respecting
- Opposing can come from a belief that you know better than every one else OR can come from a stance of acknowledging the wisdom in others
- To respect is to see people as having the right to speak

Suspending
- How we see things: we can remain stuck and certain that our perspective is the correct one, OR
- We can put aside first our perspective and acknowledge the feelings and thoughts that arise without feeling compelled to act on them
- To suspend is to by-stand with awareness in order to see what is happening more objectively

Reframing
- Involves altering one’s beliefs about the nature of the problem, issue or challenge at hand
- Involves breaking out of our normal categories of analysis and re-examining our beliefs and assumptions
- Individuals identify their core assumptions and deliberately replace or reverse them in order to gain alternative perspectives.
- The goal is to acquire a “breakthrough experience,” a significant
Your ability to dialogue is dependent on your ability to communicate.

Communication skills are some of the most important skills that you need to succeed in the workplace. We talk to people face to face, and we listen when people talk to us. We write emails and reports, and we read the documents that are sent to us. Communication, therefore, is a process that involves at least two people – a sender and a receiver. **For it to be successful, the receiver must understand the message in the way that the sender intended.**

This sounds quite simple. But have you ever been in a situation where this has not happened? Misunderstanding and confusion often occur, and they can cause enormous problems.

If you want to be an expert communicator, you need to be effective at all points in the communication process – and you must be comfortable with the different channels of communication. When you communicate well, you can be very successful. On the other hand, poor communicators struggle to develop their careers beyond a certain point.

Whenever you communicate with someone else, you and the other person follow the steps of the communication process shown below.

Here, the person who is the source of the communication encodes it into a message, and transmits it through a channel. The receiver decodes the message,
and, in one way or another, feeds back understanding or a lack of understanding to the source.

By understanding the steps in the process, you can become more aware of your role in it, recognize what you need to do to communicate effectively, anticipate problems before they happen, and improve your overall ability to communicate effectively.


“Any single perspective is likely to be partial, limited, perhaps even distorted, and only by taking multiple perspectives and multiple contexts can the knowledge quest be fruitfully advanced. And that 'diversity' is the third important truth of general postmodernism.”

– Ken Wilber, as cited by Penny Tompkins and James Lawley in *Multiple Perceptions, Perspectives and Perceivers*.

### Listening versus Hearing

<table>
<thead>
<tr>
<th>Listening</th>
<th>Hearing</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Curiosity is aroused; there is learning</td>
<td>- Info in and out</td>
</tr>
<tr>
<td>- Exerting effort</td>
<td>- No effort</td>
</tr>
<tr>
<td>- Understanding</td>
<td>- No real understanding</td>
</tr>
<tr>
<td>- Process what is being said</td>
<td>- Just hearing sound</td>
</tr>
<tr>
<td>- Person remembers</td>
<td>- Easily forgotten</td>
</tr>
<tr>
<td>- Attentive to the message</td>
<td>- Message is not given importance</td>
</tr>
</tbody>
</table>
THE DIALOGUE PROCESS

Discussion
- Bringing together many voices, stories, perspectives
- Shared inquiry, exploration, discovery
- Shared meaning-making & co-construction of knowledge

Decision-making
- Authority decides and informs
- Authority consults and then decides
- Negotiation
- Consensus
- Vote

Deliberation
- Reason argument
- Serious examination of possible solutions
- Careful weighing of tradeoffs
- Reasoned and informed judgment

The U-Process
“Six Thinking Hats” Method: Application of Dialogue

Six Thinking Hats is a good technique for looking at the effects of a decision from a number of different points of view.

It allows necessary emotion and skepticism to be brought into what would otherwise be purely rational decisions. It opens up the opportunity for creativity within Decision Making. The technique also helps, for example, persistently pessimistic people to be positive and creative.

Plans developed using the '6 Thinking Hats' technique will be sounder and more resilient than would otherwise be the case. It may also help you to avoid public relations mistakes, and spot good reasons not to follow a course of action before you have committed to it.

You can use Six Thinking Hats in meetings or on your own. In meetings it has the benefit of blocking the confrontations that happen when people with different thinking styles discuss the same problem.
Each 'Thinking Hat' is a different style of thinking.

- **White Hat:**
  With this thinking hat you focus on the data available. Look at the information you have, and see what you can learn from it. Look for gaps in your knowledge, and either try to fill them or take account of them. This is where you analyze past trends, and try to extrapolate from historical data.

- **Red Hat:**
  'Wearing' the red hat, you look at problems using intuition, gut reaction, and emotion. Also try to think how other people will react emotionally. Try to understand the responses of people who do not fully know your reasoning.

- **Black Hat:**
  Using black hat thinking, look at all the bad points of the decision. Look at it cautiously and defensively. Try to see why it might not work. This is important because it highlights the weak points in a plan. It allows you to eliminate them, alter them, or prepare contingency plans to counter them.

- **Yellow Hat:**
  The yellow hat helps you to think positively. It is the optimistic viewpoint that helps you to see all the benefits of the decision and the value in it. Yellow Hat thinking helps you to keep going when everything looks gloomy and difficult.

- **Green Hat:**
  The Green Hat stands for creativity. This is where you can develop creative solutions to a problem. It is a freewheeling way of thinking, in which there is little criticism of ideas.

- **Blue Hat:**
  The Blue Hat stands for process control. This is the hat worn by people chairing meetings. When running into difficulties because ideas are running dry, they may direct activity into Green Hat thinking. When contingency plans are needed, they will ask for Black Hat thinking, etc.
Reflection Questions

Which skill/s related to communication and dialogue do I need to improve?

What do I need to do to improve my dialogue and communication skills?
Once upon a time, a man named Ed inherited some land. Never having been a landowner before, Ed decided to visit his property. Along the way he came across a vegetable stand. The asparagus was firm; the watermelon was full; the herbs were full of fragrance.

“Good madam,” Ed called to the vegetable peddler, “where did you acquire such marvels?” Pleased with the compliment, the vendor replied, “Why, I grew them in my fields down the road.” Ed thought a minute. “Good madam,” he said again, “to what do you attribute your success?” Laughing, the vegetable peddler whose name was Linda replied, “Why, to the blessing of this fine earth, the rain, and the sun!”

An idea took hold in the mind of the new landowner. He was going to grow magnificent vegetables! When Ed came upon a seed vendor, he asked for one of everything and went to locate his property. Being an organized man, Ed decided to plant his seeds in furrows 6 inches deep and spaced 12 inches apart, in rows 3 feet apart, so that he had room for all the seedlings. After the planting was done, Ed went back to town. Now he knew that his seeds needed the sun, the rain, and the good earth, so every morning he went out to assess the day. To his great pleasure, the sun came up every day and by afternoon a gentle rain came upon the land.

When it was harvest time, Ed approached his property with great anticipation. His mouth simply watered with thoughts of his first crop. To his dismay, he found that his herbs looked like weeds, his asparagus was a skimpy harvest at best, and his watermelon had overrun a major portion of the garden.

Distraught, the landowner ran back to the vegetable stand with samples of his crops. Once again he was struck by the magnificence of what the vendor had to offer. He blurted out, “Linda, I do not understand. We both used the sun, the rain, and the good earth. Why do you have abundance when I have so little?”

The wise vegetable farmer sized up the situation. Taking the asparagus in hand she said, “This asparagus should not be cut for another two years. You must give the plant time to thicken. During the third season, you will be able to cut it and enjoy the harvest for a full month.” Taking up what was left of the herbs, she said, “If herbs are harvested incorrectly or at the wrong time, their value is lost, like the
herbs you have here.” Taking up the watermelon, she said, “This is a very vigorous plant, requiring at least eight feet between hills. That is why it took over your garden.”

Ed then asked, “Why didn’t you tell me this before? You said it was the rain, the soil, and the sun that would make my plants grow!”

Linda replied, “What I told you was correct. I didn’t know what your plans were, so I didn’t see any need for more detail. You know, Ed, vegetables are just like people. They all have different strengths and weaknesses and require different nourishing to be the best that they can be.”

TEAM DEBRIEFING:

FORM B

1. Describe some of the analogies you see between this story and your team:
   a. The earth, the rain, and the sun—The type of environment the person thrives in; what the person’s embedded life interests are (long-held, emotionally driven passions that you can attempt to feed in different job assignments, etc.).
   b. Watermelon, herbs—Different types of people exhibit different brain strengths, cultural diversity, gender.
   c. List others:
      _______________________________________________________________________
      _______________________________________________________________________
      _______________________________________________________________________

2. Why didn’t Ed get the same results as Linda? Did he err in selecting the environment? Strategy? Planning? Mentoring?

3. In Linda’s metaphoric connection of vegetables to people, how are vegetables like people?

4. If you are to coach people to their fullest potential like Linda did with the vegetables, why does it help to understand the people you are coaching?
Group

- 2 or more people who recognize themselves and one another as members of a unit and who meet in a face-to-face situation to accomplish some purpose they believe better fulfilled as a unit.

- An organization of people who must work interdependently to achieve a common goal; who share on-going responsibility for delivery of the same output, whose members may make unique contributions to the output, yet all mutually contribute to the performance of the team, and whose task includes to continually manage and improve its performance.

Elements Present in a Group

1. **Group Task:**
   Goals/activities/issues/problems the group would like to accomplish/solve.

2. **Group Members:**
   Each has a behavioral style which has to be studied.
   - Each brings with them their personal feeling state.
   - Each has internalized norms.
   - Ego – self esteem needs
   - Each has feelings about authority – control relationships

3. **Group Leader:**
   - Facilitative Style
   - Personal Feeling State
   - Internalized Norms
   - Ego or self esteem needs

4. **Group Climate:**
   - Group interaction system
   - Group atmosphere
   - Group norms/culture
5. **Contextual Elements:**
   - Physical/social relationships
   - Emotional relationships
   - Contractual relationships

The Nine Types of Group Dynamics

1. **Stages of Group Development**

   - **Forming:** Transition stage, characterized by movement from individual to team member status. This is a period of confusion, testing behavior, and dependence on a team leader for direction.

   - **Storming:** Conflict stage, characterized by in-fighting, defensiveness, and competition. Team members respond emotionally to and resist task demands.

   - **Norming:** Cohesion stage, characterized by an acceptance of team norms and roles. Team members work to achieve harmony.

   - **Performing:** Work stage, characterized by maximum work accomplishment, high level problem solving and decision making, as well as personal insight and constructive self-change.
2. **Development of Group Roles**

Two kinds of behavior for a group to complete its tasks and survive as a group:

- **Task behavior**: helps the group define and accomplish its work and reach its desired outcomes.
- **Maintenance behavior**: deal more with keeping the group together, maintaining functional relationships, and strengthening the ability to perform.

<table>
<thead>
<tr>
<th>Task Behaviors</th>
<th>Maintenance Behaviors</th>
</tr>
</thead>
<tbody>
<tr>
<td>✂ Initiating, proposing, or suggesting</td>
<td>☺ Energizing or motivating</td>
</tr>
<tr>
<td>✂ Building on or elaborating</td>
<td>☺ Gate-keeping or helping people stay included and participating</td>
</tr>
<tr>
<td>✂ Coordinating or integrating</td>
<td>☺ Harmonizing</td>
</tr>
<tr>
<td>✂ Seeking information or opinions</td>
<td>☺ Agreeing or following another’s lead</td>
</tr>
<tr>
<td>✂ Giving information or opinions</td>
<td>☺ Encouraging</td>
</tr>
<tr>
<td>✂ Clarifying</td>
<td>☺ Relieving tensions</td>
</tr>
<tr>
<td>✂ Questioning</td>
<td>☺ Compromising</td>
</tr>
<tr>
<td>✂ Disagreeing or challenging</td>
<td>☺ Observing the process</td>
</tr>
<tr>
<td>✂ Testing for understanding</td>
<td>☺ Praising others</td>
</tr>
<tr>
<td>✂ Orienting the group to its task</td>
<td>☺ Praising the progress of the group</td>
</tr>
<tr>
<td>✂ Testing for consensus</td>
<td></td>
</tr>
<tr>
<td>✂ Summarizing</td>
<td></td>
</tr>
<tr>
<td>✂ Setting work standards or reminding others of standards</td>
<td></td>
</tr>
<tr>
<td>✂ Recording or capturing content</td>
<td></td>
</tr>
<tr>
<td>TASK BEHAVIOR</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Initiating, proposing, or suggesting</td>
<td>To make a comment or suggestion to enable the group to get started.</td>
</tr>
<tr>
<td>Coordinating or Integrating</td>
<td>To show the connection or interrelation of different points of team members.</td>
</tr>
<tr>
<td>Clarifying</td>
<td>To expound or give more explanation for better understanding.</td>
</tr>
<tr>
<td>Disagreeing</td>
<td>To pose an alternative view of something or to disagree without being disagreeable.</td>
</tr>
<tr>
<td>Orienting the team to its task</td>
<td>To remind the group of the nature of the task, to get back on track, or to be more aware of limitations such as time.</td>
</tr>
<tr>
<td>Summarizing</td>
<td>To list what has happened so far and provide a brief synopsis of what has been discussed.</td>
</tr>
<tr>
<td>MAINTENANCE BEHAVIOR</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Energizing or motivating</td>
<td>To make a comment that infuses energy into the group. To praise progress, make encouraging statements.</td>
</tr>
<tr>
<td>Promoting Inclusion</td>
<td>To request that another group member be heard. (But not for the purpose of bolstering your own position.)</td>
</tr>
<tr>
<td>Agreeing or following another’s lead</td>
<td>“I see where the Bgy. Captain is going. To make sure that the pregnant women undergo pre-natal care, they have to be visited by the BHW regularly.”</td>
</tr>
<tr>
<td>MAINTENANCE BEHAVIOR</td>
<td>DEFINITION</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Relieving tensions</td>
<td>To use humor or some other method to reduce the tension level. (Stretching, moving around the room, suggesting a break, etc.)</td>
</tr>
<tr>
<td>Compromising</td>
<td>To propose a compromise: to take a part of one proposal and a part of another proposal and combine them.</td>
</tr>
<tr>
<td>Praising others</td>
<td>To compliment someone for a behavior that is helping the group to succeed.</td>
</tr>
</tbody>
</table>
3. **Psycho-social Issues**

Common Types of Issues Affecting Individuals and Interpersonal Relations:

- Trust
- Control or power
- Inclusion, identity or status
- Autonomy, dependency or counter-dependency
- Tolerance for ambiguity or the need for structure
- Competition
- Intimacy

**Levels of Issues**

*“The Iceberg”*

Level 1: **Content** is focused on the work of the group – its charter, tasks, methods, and outcomes

Level 2: **Overt group issues** comprise easily observable behaviors and interactions

Level 3: **Covert group issues** comprise the core issues for a particular group that are not talked about or displayed explicitly.

Level 4: **Deeper Individual Characteristics** includes personality factors, values, beliefs, assumptions, defense systems, basic needs and fears

Level 5: **The Unconscious** (only for trained, clinical professionals)
4. Task Progress

4 Basic Issues that Groups Need to Be Clear About, Make Decisions About and Follow Through:

✓ What

- the result will be and then outcomes will look like, what they will do and not do, and what they will be accountable for.

✓ How

- they will accomplish their outcomes, take the steps they need to take, organize the steps and flow, use specific processes and procedures, and so on.

✓ Who

- will do what, will take on what functional roles, and so on.

✓ When

- they will be done or complete different parts, and when they will meet, report, conduct various steps, evaluate, and so on.

5. Leadership

- The pattern of behavior to influence others;
- The ability to get others to want to do something that you are convinced should be done, and to follow direction
- The pattern generally involves either task behavior or relationship behavior, or some combination of both

<table>
<thead>
<tr>
<th>Style</th>
<th>Concern</th>
<th>Maturity of Team Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autocratic</td>
<td>High task, low people</td>
<td>M2 – may be willing, but not necessarily able</td>
</tr>
<tr>
<td>Abdicrat</td>
<td>Low task, low people</td>
<td>M4 – very willing &amp; very able</td>
</tr>
<tr>
<td>Middle of the Road</td>
<td>Adequate performance and satisfactory relationships</td>
<td></td>
</tr>
<tr>
<td>Country Club</td>
<td>Low task, high people</td>
<td>M3 – able, but not willing</td>
</tr>
<tr>
<td>Team Leader</td>
<td>High task, high people</td>
<td>M1 – lacking in ability; lacking in motivation</td>
</tr>
</tbody>
</table>
6. **Communication Patterns**

   The different ways information is exchanged or shared in the group:
   - Formal or Informal
   - Verbal or Non-verbal
   - Written or Oral

7. **Participation**

   - Active involvement of all members of a group.
   - Group process research shows that the highest-performing groups operate with an overall group dynamic characterized by equitable participation.

8. **Conflict Management**

   - Conflict management involves exploring differences and understanding one another’s perspectives.
   - How differences are surfaced, discussed and resolved are critical to the work of the group.

9. **Decision-Making**

   - A fundamental process in organizations by which leaders/managers choose one alternative from others.
   - Leaders/managers make decisions based on the information they receive from the behavior of individuals or groups within the organization also from sources external to the organization.
Worksheet 4.1: **Team Member Task Behavior Evaluation**

**Instructions:** Put an x in the box that indicates the degree to which you feel you have been performing in the following team member task behaviors. Samples of comments that typify the task behavior are provided as guides only. Your comments may have been substantially different.

<table>
<thead>
<tr>
<th>TASK BEHAVIOR</th>
<th>SAMPLE COMMENT</th>
<th>During team activities, I have performed this behavior,</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiating, proposing, or suggesting</td>
<td>“What if we were to…”</td>
<td>Often</td>
</tr>
<tr>
<td>Building on or elaborating</td>
<td>“If I could add to that, I think…”</td>
<td>Often</td>
</tr>
<tr>
<td>Coordinating or Integrating</td>
<td>Bong’s idea about…fits well with Tony’s concept of…”</td>
<td>Often</td>
</tr>
<tr>
<td>Seeking information or opinions</td>
<td>“Can you tell me more about…?” or “Can you give me more information about…..?”</td>
<td>Often</td>
</tr>
<tr>
<td>Clarifying</td>
<td>“What we meant by that was…”</td>
<td>Often</td>
</tr>
<tr>
<td>Questioning</td>
<td>“I wonder what effect this would have on…”</td>
<td>Often</td>
</tr>
<tr>
<td>Disagreeing</td>
<td>I don’t see it that way. To me….”</td>
<td>Often</td>
</tr>
<tr>
<td>Testing for understanding</td>
<td>“Let’s see. Would implementing this mean that we will push back our projected implementation date….?”</td>
<td>Often</td>
</tr>
<tr>
<td>TASK BEHAVIOR</td>
<td>SAMPLE COMMENT</td>
<td>Often</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Orienting the team to its task</td>
<td>“We’ve tackled three items on the agenda. We still have 2 to go and it’s 4 o’clock.”</td>
<td></td>
</tr>
<tr>
<td>Testing for consensus</td>
<td>“Does anyone disagree with what we’ve decided so far?”</td>
<td></td>
</tr>
<tr>
<td>Summarizing</td>
<td>“We’ve laid out six key factors of the problem and have come up with a few solutions....”</td>
<td></td>
</tr>
<tr>
<td>Recording or capturing content</td>
<td>“Can we make sure that we’ve noted that we will still need to....”</td>
<td></td>
</tr>
</tbody>
</table>
Worksheet 4.2: **Team Member Maintenance Behavior Evaluation**

**Instructions:** Put an x in the box that indicates the degree to which you feel you have been performing in the following team member task behaviors. Samples of comments that typify the task behavior are provided as guides only. Your comments may have been substantially different.

<table>
<thead>
<tr>
<th>MAINTENANCE BEHAVIOR</th>
<th>SAMPLE COMMENT</th>
<th>Often</th>
<th>Sometimes</th>
<th>Seldom</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energizing or motivating</td>
<td>“You know, if we make it through our health targets, we'll have gotten further than any other municipality.”</td>
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<tr>
<td>Gate-keeping</td>
<td>“We're speculating too much about personalities. Let's get back on track.”</td>
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<tr>
<td>Promoting Inclusion</td>
<td>“I'd like to hear from Sherwin on the health status of the community.”</td>
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</tr>
<tr>
<td>Harmonizing</td>
<td>“I want to look closer at the data and get off the emotional stuff. There’s really more that’s the same about the two proposals than is different. What’s similar is…..and what’s different is…”</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>MAINTENANCE BEHAVIOR</td>
<td>SAMPLE COMMENT</td>
<td>During team activities, I have performed this behavior,</td>
<td></td>
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<td>------------------------------------------------------</td>
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<tr>
<td>Agreeing or following another's lead</td>
<td>“I see where the Bgy. Captain is going. To make sure that the pregnant women undergo pre-natal care, they have to be visited by the BHW regularly.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Encouraging</td>
<td>“Aw, cmon. Let's not quit so easy. Remember where we were in our infant mortality last year when everything seemed hopeless?”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Relieving tensions</td>
<td>“You sure do have a lot of strong beliefs. I believe we ought to take a 5 minute break and come back fresh.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Supporting adherence to agreed upon group standards</td>
<td>“Before we quit, remember we all agreed we’d hang together with our decisions once we made them. Is there any reason this one is an exception?”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Compromising</td>
<td>“Well, if we go with a pilot test for 3 months instead of a full blown plan, we can still get the data we need for full implementation in the next budget cycle.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>MAINTENANCE BEHAVIOR</td>
<td>SAMPLE COMMENT</td>
<td>During team activities, I have performed this behavior,</td>
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<td>------------------------------------------------------</td>
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</tr>
<tr>
<td>Observing the process</td>
<td>“What I’m noticing is that we’re already assessing the proposal at hand before we’ve thoroughly understood it. We need all the facts first.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Praising others</td>
<td>“Wow, Liza. I don’t see how you got all the data for us in just one week. Now we can really move today.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
<tr>
<td>Praising the progress of the group</td>
<td>“Hey, you know we got through this whole meeting without a single dumb joke or sarcasm to get us off track.”</td>
<td>Often</td>
<td>Sometimes</td>
<td>Seldom</td>
<td>Not at all</td>
</tr>
</tbody>
</table>

**CO-OWNERSHIP: Leader as a Coach**

Coaching team members is a necessary competency for leaders. Savvy leaders coach team members so that they can improve their skills and develop greater self-confidence.

**Coach**

An experienced leader who provides guidance and support to his/her team members and facilitates his or her personal development.

**Coaching**

- It is the art of drawing for potential into high performance.
- Stimulates and inspires growth in others

**What are Coaching and Mentoring?**

Both coaching and mentoring are processes that enable both individuals and teams to achieve their full potential.

Coaching and mentoring share many similarities so it makes sense to outline the common things coaches and mentors do:

- Facilitate the exploration of needs, motivations, desires, skills and thought processes to assist the individual in making real, lasting change.
- Use questioning techniques to facilitate coachee’s own thought processes in order to identify solutions and actions rather than takes a wholly directive approach
- Support the coachee in setting appropriate goals and methods of assessing progress in relation to these goals.
- Observe, listen and ask questions to understand the coachee’s situation
- Creatively apply tools and techniques which may include one-to-one training, facilitating, counseling & networking.
- Encourage a commitment to action and the development of lasting personal growth & change.
• Maintain unconditional positive regard for the coachee, which means that the coach is at all times supportive and non-judgmental of the coachee, their views, lifestyle and aspirations.

• Ensure that coachees develop personal competencies and do not develop unhealthy dependencies on the coaching or mentoring relationship.

• Evaluate the outcomes of the process, using objective measures wherever possible to ensure the relationship is successful and the coachee is achieving their personal goals.

• Encourage coachees to continually improve competencies and to develop new developmental alliances where necessary to achieve their goals.

• Work within their area of personal competence.

• Possess qualifications and experience in the areas that skills-transfer coaching is offered.

• Manage the relationship to ensure the coachee receives the appropriate level of service and that programs are neither too short, nor too long.

Comparison

The common thread uniting all types of coaching & mentoring is that these services offer a vehicle for analysis, reflection and action that ultimately enable the coachee to achieve success in one more areas of their life or work.

However, we can glean the differences from their definition.

*Coaching* is "a process that enables learning and development to occur and thus performance to improve. To be a successful a Coach requires a knowledge and understanding of process as well as the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place".


While *Mentoring* is "help by one person to another in making significant transitions in knowledge, work or thinking".

The difference between coaching and mentoring

As can be seen above, there are many similarities between coaching and mentoring! Mentoring, particularly in its traditional sense, enables an individual to follow in the path of an older and wiser colleague who can pass on knowledge, experience and open doors to otherwise out-of-reach opportunities. Coaching on the other hand is not generally performed on the basis that the coach has direct experience of their coachee’s formal occupational role unless the coaching is specific and skills focused.
Appreciative Inquiry

An inquiry that selectively seeks to locate, highlight and illuminate the life-giving forces of an individual, group or organization (AIM-Center for Bridging Leadership)

Appreciative Inquiry 4D Cycle

<table>
<thead>
<tr>
<th>Problem Solving</th>
<th>Appreciative Inquiry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Identification</td>
<td>Discovery: What gives life?</td>
</tr>
<tr>
<td>Cause Analysis</td>
<td>Dream: What might be?</td>
</tr>
<tr>
<td>Solution Analysis</td>
<td>Design: How it will be?</td>
</tr>
<tr>
<td>Action Planning</td>
<td>Destiny: What we will do?</td>
</tr>
</tbody>
</table>
CO-OWNERSHIP: KOTTER’S 8-STEP CHANGE MODEL

1. Establish a Sense the Urgency
   - Overcome Complacency
   - Detecting false urgency thru evaluation and analysis
   - Change in the Heart and Mind
   - Setting Scenarios to realize change

2. Create a Guiding Coalition
   - Strategic group of Shapers & Decision Makers
   - Small group with Co ownership

   **4 Qualities of Effective Guiding Coalition**
   1. Position Power – those in power will set trends
   2. Expertise – technical leadership
   3. Credibility – leadership with high capital
   4. Adaptive Capacity – leaders that can engage, change mindsets and behaviors

3. Develop a Change Vision
   - Clarify how the future will be different from the past
   - Short to Mid-term Vision
   - Involves the Current Reality
   - Imaginable
   - Desirable
   - Feasible
   - Flexible
   - Communicable

4. Communicate the Vision for Buy-in
   - Simple
   - Repeatable
   - Vivid
   - Invitational/Engaging
5. **Empower Broad based Action**
   - Creating avenues for participation and co-ownership
   - Enabling people to operate change
   - Communicating change deeper thru participation
   - Opportunities for repetitive learning engagement

6. **Generate Short Term Wins**
   - Plan and Breakdown change to small parcels
   - Clear & related to the change effort
   - Visible and unambiguous
   - Communicate & Celebrate Small gains
   - Affirm people in their role on the gains

7. **Build on Emerging Change**
   - Don’t let up, consolidate gains to build more change
   - Identify the emerging change(s)
   - Re-Communicate & establish a narrative for the change effort
   - Rationalise Generative Change: Realize the small changes that build on each other
   - Create a momentum by communicating the emerging change
   - Establish programs that continue the change

8. **Anchor the Changes to the culture**
   - Establish Integrative processes to anchor the new mental models
   - Establishing new values from the change
   - Creating policies that sustain the new practice
CO-CREATION: ACTION PLANNING

At this point, you need to identify priority issues and potential areas for immediate action to sustain your leadership role and contributions. Your Leadership Development (Worksheet 5) and Colored Outcomes Worksheet (Worksheet 3) will help you systematize your re-entry plans for the next six months.

Review the Health Leadership Roadmap for this purpose. This could help you identify areas for action.
**Worksheet 5: Leadership Development Plan**

Think about everything that you have learned in this module and how you will apply and practice in the next six months what you have learned.

<table>
<thead>
<tr>
<th>Things that affect others negatively I should be more aware/conscious about</th>
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</thead>
<tbody>
<tr>
<td>▪ Attitudes do I have about work, family, etc.</td>
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<tr>
<td>▪ How I behave towards my colleagues, staff, family, constituents, etc.; My mannerisms</td>
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<td>▪ How I relate with them. How I communicate with them</td>
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**New Commitments to make**

**New Practices to Begin**

**Potential Obstacles**

**Things that I need to help me overcome the obstacles**

**When will I do them? How do I know that I have succeeded?**

Adapted from the Leadership Growth Plan in Leadership From the Inside Out by Kevin Cashman
**PROBLEM PRIORITIZATION:** Refer to your colored worksheets and rate your current health challenges. Rank them according to the given criteria.

<table>
<thead>
<tr>
<th>Health Problems or Challenges</th>
<th>Urgency (Can this result in death or disability?) 25 points</th>
<th>Magnitude (How many people are affected by the problem) 25 points</th>
<th>Availability of Technology to Solve The Problem (are there available protocols/drugs/facilities to solve the problem?) 25 points</th>
<th>Implication of Inactions (If not attended to, can the problem lead to more serious problems?) 25 points</th>
<th>Total Points 100 points</th>
<th>RANK</th>
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<tbody>
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ACTION PLAN TEMPLATE

Review your current indicators. **What health indicators are not performing well?** Group these indicators according to the 6 building blocks of a strong local health system. **How will you address these health indicators to improve them?** Consider the role of the Mayor, MHO and Community Leader. **What would be the contributions of each member of the team to reach your desired outcomes?**

<table>
<thead>
<tr>
<th>Municipality</th>
<th>Time Period:</th>
</tr>
</thead>
</table>

### ACTION PLAN

<table>
<thead>
<tr>
<th>Health Issues</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Health Problem</strong></td>
<td><strong>Current Indicator</strong></td>
</tr>
<tr>
<td>---------------</td>
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</tbody>
</table>

