Kansas Community Leadership Initiative

Curriculum

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Welcome to the Kansas Community Leadership Initiative, known throughout the state as KCLI. This curriculum, as well as the broader KCLI initiative, is a critical part of the Kansas Leadership Center (KLC). The Kansas Leadership Center is unique among leadership development organizations because of its statewide scope, focus on civic leadership and significant financial support from the Kansas Health Foundation.

In some ways it may seem strange that the Kansas Health Foundation (KHF), a private philanthropy dedicated to improving the health of all Kansans, has added civic leadership as one of its key areas of investment. But the Foundation's long-term commitment to health in the broadest of definitions (including many quality of life measures) has confirmed its belief that strengthening civic leadership at the community level will lead to a physically, socially and economically healthier Kansas. Here is how it all got started for us.

The Kansas Health Foundation has been thinking about leadership development for much of the last 20 years. Through key listening tours over the last two decades, the Foundation began to understand that in order to accomplish its mission as a health foundation, it must invest in community leadership and capacity building in a comprehensive and sustained way.

The listening tours communicated very clearly that the lack of adequately trained community leadership was a barrier to community health. As one participant said, "We need leaders who are willing to stand up and say why it makes sense to invest in public health and children's health issues." Our listening tours uncovered over and over that there are "too few leaders being asked to do too much."

Kansas, like many other states, faces critical social, economic, and technical realities. We need leaders who can work together to create a shared vision so that long-term solutions for health can be implemented. We need leaders who can build consensus on comprehensive public policy to improve health and the social determinants of health. Finally, we need leaders who can build bridges that create the public will to act on critical issues like health policy that affect the well-being of all Kansans.

While we know there is a need for more skilled civic leadership, the KHF listening tours identified a primary obstacle for replenishing or preparing leaders: the lack of vehicles or organizations to teach civic leadership skills. Before the mid '90s, most Kansas communities did not have a skill-focused community leadership program that could teach collaborative problem solving or ways to engage a community's diverse citizens around issues of common concern. Experience has taught us that the presence of a "leadership program" is not the same as developing effective leadership. The need for a comprehensive community leadership model that is skill-based helped fuel what has become the Foundation's highly successful Kansas Community Leadership Initiative (KCLI). Working with almost all of the existing Chamber of Commerce leadership programs in the late '90s, two

consultants, Mary Jo Clark and Pat Heiny, helped fashion a new approach to leadership in Kansas—KCLI—that was skill-based, collaborative, and action-oriented. The goal of the KCLI program was clear: to train more community leaders in the skills needed to make Kansas communities better places to raise children.

Using a "train-the-trainer" approach, each community participating in KCLI sent the executive director of their local community leadership training program and influential alumni to receive intensive training in the twenty-first century leadership skills such as community visioning, group facilitation, learning styles, collaboration, and consensus-building. After training, the executive director and alumni were expected to return home and incorporate the new approach into their community leadership programs. The Foundation has reached 41 communities with this new approach to leadership training. KCLI has helped to revitalize community leadership efforts by integrating collaborative leadership practices and skills into existing programs. Newly trained KCLI leaders are using new skills and new ways of working together to make Kansas communities better places for children and their families to live and grow. This curriculum builds on the work begun in 1999 and will be made available to communities throughout the state in early 2009.

As the existing KCLI communities have already demonstrated, there is growing evidence that when collaborative leadership skills are learned with other like-minded folks interested in improving their community, civic engagement increases. Proactive change and cooperation are more likely to take place when there is a common foundation of knowledge and skills. Likewise in the national and international arenas, there is a persuasive body of knowledge that shows positive change occurs when citizens (and not just the commonly identified "leaders") have the skills, opportunities, and control to make decisions on their own futures.

The Kansas Community Leadership Initiative curriculum allows people from across our state to have access to the skills, training, and relationships needed to be more effective in exercising leadership. Famed leadership expert John Gardner describes the leaders we need in our Kansas communities as the "Responsibles." These 'Responsibles,' says Gardner, "exist in every community but rarely form effective networks." They come from all sectors and all backgrounds and are committed individually and collectively to "furthering their purposes in the public arena with tough-minded skill and effectiveness. They must find each other, learn to communicate, and find common ground. Only then can they function as the keepers of the long-term and common agenda."

The Kansas Leadership Center is proud to be a partner in cultivating civic leadership throughout our state. We believe that strong civic leadership correlates positively with healthy social, economic, and physical conditions. Public health will improve when community members are engaged more actively in the civic process. The KCLI program will develop the skills and relationships needed to work for and advocate for healthier, more vibrant communities for everybody. This is an exciting journey of learning and change.

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Overview of the Curriculum

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Unit One: Gathering to Learn About Leadership

This unit will discuss the characteristics of effective communities, the role that civic leaders play in healthy communities, the gifts that residents bring to the community table, and what it means to be a servant leader. During these discussions, participants will get to know each other better and become familiar with the work that each is doing in the community.

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Unit Two: Seeing Yourself as a Leader

This unit will shift the focus to the role of the individual in building a performing, effective community. By using the stages of group development, discussion of learning styles, and understanding chaos theory, participants will learn new skills to be able to lead more effectively in their communities.

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Unit Three: Creating a Shared Understanding of the Past to Create a Shared Vision for the Future

This unit will challenge and encourage creativity. In order to create a new vision for communities, civic leaders must look beyond the familiar and take a fresh look at the realities and possibilities of their communities. Using a visioning process and timeline, participants will begin to develop the frame for a community project.

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Unit Four: Practicing Consensus Building

This unit will enforce the importance of performing community groups. Too often communities are stuck in process, differing views, and the inability to hear each other. Using the role of the servant leader as the base, participants will learn how to lead a group (or their community) out of chaos and into performance. This discussion will include the roles of a team, ways to build consensus, active listening, and appreciative inquiry.

Unit Five: Collaboration

This unit moves the group to action. This unit will give participants the opportunity to practice their new leadership skills. It will focus specifically on ways to collaborate on critical issues, how we learn to include rather than exclude in community work, and how we continue to learn and reflect on our thinking and actions through the Learning Cycle.

Unit Six: Advocating for the Changes We Want

This unit focuses on the tools needed to take action. Participants learn how to identify and define the issues they care about, how to organize an advocacy campaign with other stakeholders, how to develop a clear, influential message about the issue to garner broad support, and how to sustain advocacy efforts.

Unit Seven: Growing and Celebrating as Leaders

This unit allows the participants to plan and discuss their own personal journey. Too often individuals leave a training enthusiastic to get started only to be thwarted by the realities for life that limit time and activities. This session gives participants an opportunity to both plan and commit. They look at their gifts with others in the group (mirroring), create a personal mission statement, debrief their project planning experience and group work, and finally, celebrate their accomplishments as servant leaders with a group of highly committed colleagues.

Tips for Facilitators

The course content of this training program was developed with the knowledge of how people, expecially adults, learn best. By keeping some basic principles of adult learning in mind, you will be better able to implement the program, and more importantly, adapt it when necessary.

Likewise, the presentation of this material takes into consideration the various ways individual facilitators approach their community leadership program activities. Some are paid full-time staff whose sole purpose is to create and deliver a meaningful experience for program participants. Others are part-time staff whose time is divided between leadership program delivery and other pressing job duties. Still others are volunteers—for a "day" or the entire program—for whom the satisfaction of a job well-done is the only reward. In short, each facilitator aproaches this curriculum with a different set of expectations and a different amount of time to devote to study and pre-session preparation. Regardless of need or time availability, each facilitator should find this document equally informative and easy to work with.

Offering the KCLI Program

Each unit outlines a highly interactive training session and provides specific nuts-and-bolts suggestions to aid the trainer in planning and delivering the training. Content in the units is progressive; each unit builds on the knowledge, experiences, and skills developed in the unit preceding it. To achieve the full benefit of the program, groups should participate in all seven units.

There is no "right" format or timefame to offer the program. Depending on the schedules of your participants, weekends, one night on successive weeks, or once a month for seven months works. A combination of times, such as a two-day opening and/or closing retreat with the balance of days sandwiched in between, is another approach that has worked in some communities. The units are designed to take about four hours. This allows time in each session for tours, guest speakers, class projects and other "awareness and networking" activities traditionally included in community leadership offerings.

Structure of the Units

The units as presented herein use the following standardized format:

A unit outline and participant agenda: A one-page overview of the unit "at-a-glance."

Background information for the facilitator: Detailed information for the facilitator that may optionally be shared with class participants. This provides discussion of theories that influence the content of the unit as well as any additional tips concerning advance preparation.

A facilitation guide and session script: This step-by-step process for presenting the unit includes what to say and when, how to present exercises, when to distribute handouts, and a running timeframe for the day, including breaks.

Handouts: The supplemental materials to be given to participants during the unit presentation. These can be background readings on topics in leadership theory, exercises to be done in class, or guidelines to help with homework between gatherings.

Alternatives … with handouts as needed: A collection of information at the end of each unit consisting entirely of optional materials for use as needed to tailor (or lengthen) your curriculum to the individual needs of your class.

Basic Principles of Adult Learning

Education is Most Effective When it Includes Real-Life Circumstances

The central organizing principle for civic leadership training must be around real problems communities face, not abstract ideas. While the KCLI program presents skills and subject matter, the lead facilitator's responsibility is to make every unit relevant. Whenever a specific community issue is presented as the basis for an activity, trainers should feel free to substitute different issues of local and pressing concern to participants in the training.

Learning is Most Effective When it Involves the Learners

The KCLI program uses a variety of formats so that participants stay active and engaged—a range of activities including: small- and large-group discussions, brainstorming, creative presentations, and even artwork—as instructional methods.

People Learn New Material More Quickly When it is Related to What They Know

In every unit, participants surface their knowledge, attitudes, and/or beliefs about the subject matter or idea presented in the session. This is a deliberate design element based on the assumption that prior knowledge forms the best foundation for subsequent learning. Moreover, when facilitators become aware of what participants already know about a topic they can draw on that expertise in ways that will respectfully enhance the training experience for everyone.

Organizing a KCLI Training Program in Your Community

The KCLI program is designed to be adapted by a wide range of communities, large and small, throughout Kansas to improve the health of all Kansans. This section summarizes key strategies to implement a successful training experience.

Create a Management Team

We recommend that the groups or organizations interested in sponsoring a KCLI program identify a broad range of community leaders to serve as partners on a management team that could offer direction and advice. Although one organization in the community often will take primary responsibility for directing the program, the director(s) of the initiative can benefit from engaging other community leaders in the mission and accomplishments of the program. A management team with representatives from the public, for-profit, and nonprofit sectors in the community can help an organization in recruitment, program design, fundraising, and sustainability efforts.

Invest Energy Recruiting Participants

The KCLI program offers communities a unique opportunity to prepare and mobilize residents from all walks of life to work together to address a range of community issues that affect personal and public health. To reap the full benefit of the program, communities should think about how to engage people who are not the "usual suspects" in civic problem solving. This demands creative thinking about whom to reach and how to reach them. Consider race and ethnicity, gender, age, background, interests, education level, socioeconomic level, and different ideological perspectives as you recruit.

KCLI is Designed for a Broad Range of Participants

The KCLI program is intended to equip people throughout Kansas with the skills needed to participate more effectively in community problem solving.

- The training program is especially designed for use with populations who do not have a history of working together. However, it is also for community groups that may have worked together for some time and want tools to increase their capacity to achieve better results.
- The training program is intended to be accessible to a wide range of people working (either

paid staff or volunteers) in public, nonprofit, and for-profit sectors and in urban, rural, and suburban settings.

- The training program is designed for neighborhood groups, youth groups, religious organizations, volunteer associations, and civic groups involved in community efforts.
- The training program is designed for use by community-wide and regional partnerships comprised of diverse people trying to address a joint problem.

KCLI Equips Participants to Take Action

Ultimately, the KCLI helps participants work together to take action to address community issues. Discussing issues from different perspectives adds a breadth to our knowledge of ways to address issues collaboratively. Do not be afraid of conflict in your group; just be prepared for it. The way to make sure that your group will have differing viewpoints is to include a mix of grassroots participants, visible community leaders, and people who hold positions at all levels in a range of institutions and organizations.

Find Opportunities for Graduates to Connect to Community Involvement and Continued Learning

The KCLI program serves as a vital community connector linking people with community opportunities. Inform networks of nonprofit organizations, local government, civic associations, and other potential partners about the program so that they can help identify opportunities and match participant skills with community needs. Establishing a network for graduates of the program to stay in close communication with each other will also help people continue to develop and apply their leadership skills. Think about a range of ways to keep the network connected and informed— from the Internet to regular meetings to joint projects.

For information about organizing a KCLI program in your community, contact the Kansas Leadership Center at info@kansasleadershipcenter.org.

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KCLI CURRICULUM

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UNIT ONE

Gathering to Learn About Leadership

Overview

Purpose of Unit One

Learning Objectives:

- Provide an opportunity for participants to begin to get to know one another
- Introduce the concept of servant leadership
- Introduce steps to a performing community and provide the launching point for reinforcing this concept in every session

Other Purposes of the Session:

- Create excitement about the community
- Invite participants to be involved in leadership roles
- Describe effective twenty-first century communities and the kinds of leadership capacities needed in them

Unit One sets the stage for the entire KCLI leadership program and the capacities that will be gained over the course of the experience. Participants will begin learning the characteristics of an effective community and how broad-based leadership is central to a performing community. In addition, participants will have opportunities to build trusting, convivial relationships with members of their group.

Participant Agenda

I.	Welcome and Overview
II.	Building our Group Resume
	BREAK
III.	Servant Leadership—The Heart of Leadership
IV.	Our Community—A Good Place to Live
	BREAK
V.	Introduction to a Performing Community
VI.	Closing Circle

Gathering to Learn About Leadership

Learning Objectives:

- Provide an opportunity for participants to begin to get to know one another
- Introduce the concept of servant leadership
- Introduce steps to a performing community AND provide the launching point for reinforcing this concept in every session.

Other Purposes of the Session:

- Create excitement about the community
- Invite participants to be involved in leadership roles
- Connect the group as a performing community
- Describe effective twenty-first century communities and the kinds of leadership capacities needed in them

Questions to be Addressed:

- What do communities that work well do differently?
- How should communities perform if they are to solve problems and provide a high quality of life for all residents?
- What role do civic leaders play in this process?
- How has our changing world affected our community?

Unit One sets the stage for the entire KCLI leadership program. Participants need to know the characteristics of an effective community and the importance of broad-based leadership in making it effective. In addition, the experience will be enriched greatly if trusting, convivial relationships can be fostered among the group.

Background for Lead Facilitator

Community is defined as places where people gather. The description is the same whether one is at home, at work, or participating in the geographic community. Each person is part of many different communities. But communities now are different than when most of us grew up—they have more challenges and more opportunities. Some of what worked in the '60s and '70s is not appropriate for today and tomorrow. However, some of the values and priorities we have always had remain firm. As we create our new picture of effective communities, we need to frame it in a larger context. As participants think about their community work, they must be aware of how things are changing, what needs to change, and characteristics of a performing community. The following six trends illustrate the changes we have experienced or will experience in communities.

New economy—Communities used to be supported by local or regional businesses that were tailored to the economy of the area. Whether it was the local bank or hardware store, community members knew the owners and where the available jobs might be. No longer are things quite so neat. Technology has reduced the need to be in a particular geographic place. The local workforce can work globally. Many formerly locally owned businesses are now owned elsewhere. Farm and manufacturing work operates on fewer employees, more machines, and less brawn. Thomas Friedman wrote in his book, *The World is Flat*, "If you want to grow and flourish in a flat world, you better learn how to change and align yourself with it." What else has the changing economy meant for this community?

Global security—After the devastation of September 11, 2001, our lives changed forever. Increased security means longer lines at airports and train stations. We also know that we are vulnerable to outside influences that we were unthinkable a decade ago. We are more cautious and in some cases more intolerant of differences. How have the threats of global security affected this community?

Changing demographics—America is a land of immigrants. From the nineteenth century influx of Italians, Irish, Polish, and Germans to the more modern day immigration of Hmongs, Latinos, Afghanis, and Sudanese, America is feeling the changes that come with different cultures and different ideas. For example, by the year 2020, it is estimated that one-half of the growth in America's workforce will be Hispanic. Kansas is considered to be an Hispanic growth state with a projected 200 percent increase in the Hispanic population but less than 200,000 in actual individuals. What is the diversity of our community now and how can we insure that we are preparing all our citizens to participate in an effective twenty-first century community?

Building a new workforce—In Richard Florida's book, *The Rise of the Creative Class*, he challenges the way communities look at quality of life and economic development. He has found that 30 percent of our workforce is involved in work that he terms "creative". He believes that businesses will just keep increasing this percentage. According to Florida, "to attract and sustain such workers and companies we must build a community that is tolerant of all lifestyles, one that fosters and supports creative work." Is our community a tolerant, welcoming place? How are we positioning our community in the creative economy?

Ethics—Integrity has taken a bashing as we look at corporate and government scandals of late. What happened to honesty and fairness? Our communities are only as strong as each sector.

To attract and sustain such workers and companies we must build a community that is tolerant of all lifestyles, one that fosters and supports creative work.

— Richard Florida

We count on our small businesses, corporations, and our nonprofits to share in community life. This leads to another current reality—accountability. From education to social services to our workplaces to city hall—we are asked to perform and perform well. Is our overemphasis on performance guiding the way for ethics breaches? Are we making people think that results are easy and do not require the hard work that we know is required? Is there evidence of this in our community?

Aging population—Along with the changing ethnic diversity in the country, we can also expect changes in age diversity. As people live longer and retire earlier, our communities are likely to have a wealth of older citizens with time to spare and experience to share. How can this resource be used to make our community more effective as we move into the twenty-first century?

Effective Performing Communities

Given these trends and the headlines taken from today's news, how should healthy communities function? What are the characteristics of an effective community for this current environment? As our world has evolved, so have our definitions and expectations of community participation, philanthropy, and effectiveness. In the last decade of the twentieth century, we began looking at community success with new eyes and new expectations. Current community challenges call for new ways of working together. A survey of community development literature and the experience of other KCLI participants produced this descriptive list of effective communities. Ask participants to add to the list.

Facilitative, Collaborative Communities:

- Are leader-full; everyone is a facilitator
- Exhibit a high level of trust and respect
- Work for all the residents
- Encourage positive relationships among diverse citizens
- Are rich in collaborations and partnership
- Demonstrate forgiveness and creative problem solving
- Have processes in place that enable people to build consensus and coalitions within an uneven balance of power
- Foster and support creativity and innovation
- Are flexible
- Identify shared values and focus on the common good
- Create and implement a shared vision of the preferred future
- Celebrate and appreciate

It became clear from research about effective towns, cities, nonprofits, corporations, and vigorous groups of all kinds that the description of an effective community applies to any and all groups. This should be quite reassuring to your participants as it means that all can and should be leaders in a variety of settings.

Steps to a Performing Community

Your role as the facilitator is to help the group recognize the characteristics of a performing community and then apply them within their own group. For a group to work effectively—to become leader-full—it must become a performing community. Some call it a winning team, a giving congregation, a profitable business, or an effective board. A performing community accepts and supports differences, communicates openly and with respect, and works together for the common good. Only when we work as a true performing community can we face and honestly solve the difficult issues. A performing community is willing to risk, share leadership, and serve others. The members of a performing community are servant leaders.

There are four distinct steps to a performing community—Gathering, Chaos, Unity, and Performing. To develop this community, groups go through these four steps. These steps apply to committees, to boards, to companies, to leadership classes, and to families. Your group should be clear about these steps.

Gathering—In the gathering stage people feel uncertain, cautious, fearful, confused, anxious, and excited. They depend on the leader for structure and a safe environment. At this time, participants are not very open. There is concern for personal identity—people will wonder if they belong. Conversation is guarded and polite—focusing on the weather or sports. Participants wonder: What is this group's purpose? What's in it for me? Do we have a leader? The group accomplishes little, if anything, that concerns its project or work. If you have made the group feel comfortable and provided a structure for them to get to know one another, the group will move naturally to the next step.

Chaos—At this step people are jockeying for position. They feel stressed, left out, competitive. They want to know where they fit in this group. They do not listen well—calling on previous experience to impress the other participants. They question tasks; they question the leader; they just question. Very often one person tries to dominate the group, and because the other members are not feeling confident about their skills or their role, they will let that person rule. There is even choosing of sides. During this time there is a lot of joking at the others' expense and one-upmanship. The behaviors are a smoke screen as people try to find out who has the power, how they will fit into the group, and whether the group can work together. People need time to work out their relationships with others.

Unity—In unity, people feel part of a team. There is cohesion, cooperation, optimism, respect, and trust. The group begins to relax. People know each other well, know what they can contribute to the group, and therefore, they encourage and support each other. Humor is plentiful and friendly. At this time there is powerful interaction in the group. People are honest and can give constructive criticism. They understand each other's perspective. In this stage, members are asking, are we working together to reach our goal? Can we switch roles? Can I lead?

Performing—By the time a group enters the performing stage, people are relaxed with their own role. They understand what is expected of them and what they can do even without the group. They show confidence, commitment, and enthusiasm. They feel comfortable enough in the group that there can be constructive self-change and members can take risks. They enjoy the satisfaction of the team's progress. As they move through various tasks, different members assume leadership roles; therefore, roving leadership is important.

These steps and stages are not static. Each group moves in and out of these steps depending on the addition of new members and the challenges of new tasks. The time spent in the early stages is lessened once you have been able to get a group to the performing level.

Using twenty-first century processes and capacities of visioning, learning styles, cycle to change, mirroring, and empowering others, a group can move through the work of each step to become a performing community. You will be exposing the group to each of these processes during your leadership program.

Needed: Twenty-first Century Leaders

An effective twenty-first century community needs citizens, elected officials, corporate heads, etc. who are willing to create and realize this vision of a performing community. What is the new model of effective leadership for the opportunities and challenges of the twenty-first century? Appropriate leadership must reflect the needs, challenges, and desired outcomes of the time. The following list describes the attributes and characteristics of effective and appropriate twenty-first century leadership.

Twenty-first Century Leaders:

- Are collaborative leaders
- Serve out of a personal mission
- Focus on others
- Build performing communities
- Are inclusive and value diversity
- Foster and support creativity
- Seek consensus
- Forge collaborations
- Lead to a shared vision
- Facilitate from the side of the room
- Are change agents

A New Approach to Leadership

The changes in our communities require that twenty-first century leaders have a new set of skills and competencies to operate in the global world. The "great man" theory of leadership that we once followed operated on the assumption that only one person was needed for direction and change. We now know that all organizations—corporations, governments, and communities—need many people involved in making decisions and creating success. As John Gardner once wrote, "Leaders come in many forms, with many styles and diverse qualities. There are quiet leaders and leaders one can hear in the next county. Some find their strength in eloquence, some in judgment, some in courage." The issues we face are tough but more importantly they are also intertwined with other problems. As leadership gurus, John Bryson and Barbara Crosby write, "No single person, agency, or jurisdiction has the sufficient power to develop and implement solutions unilaterally." We need a new set of skills to bring people together to find those solutions.

Leadership Capacities

Today's effective leaders must, therefore, have different skills and capacities if they are to be able to accomplish the tasks of leadership as listed. Larraine Matusak reminds us that today: "Leadership is not necessarily a title or a powerful position; it is a process, it is relational, it is making something happen, it is leaving a mark." The list of capacities evolves over time. As community work changes, an additional capacity is recognized and added to the list. We know that leadership capacities must be for the many not just for the select few. We must find more ways to prepare citizens for their civic responsibilities. As Suzanne Morse wrote in *Smart Communities*, "championship communities need a strong bench." That is, many people prepared and willing to participate in community life. Just as with any winning team, every person needs to contribute to success.

Because the challenges and opportunities are quite complex and very broad, it is important to include many perspectives and ideas as we design solutions and create visions. One interesting mark of effective communities is the concept of leader-full put forth by the Kettering Foundation. All communities no matter their size or description need leadership. Therefore, our towns, corporations, and organizations require a great many leaders with different attributes. John Gardner declares: "What produces a good result is the combination of a particular context and an individual with the appropriate attributes to lead in that context."

Everyone who is participating in this program is a leader. One of the most important responsibilities of the facilitator will be to convince participants that not only are they leaders, but they have a responsibility to step forward.

During the course of the KCLI program you will be talking about several types of leadership. We sometimes use these terms interchangeably. Collaborative/facilitative/servant leadership refers to a style of leadership that encourages individuals to work together to solve problems. These leaders focus on the problems to be solved rather than their own personal solution. This approach to leadership encourages individuals and groups to convene multiple stakeholders and facilitate and mediate agreement around tough issues. Servant leadership is a practical philosophy developed by Robert Greenleaf, that supports people who choose to serve first, and then lead as a way of expanding service to individuals and institutions. Servant leaders may or may not hold formal leadership positions. Servant leadership encourages collaboration, trust, foresight, listening, and the ethical use of power and empowerment. While some in your group may be concerned about the term "servant" in this form of leadership, it has a powerful message that must be explained and unpacked. It is about unleashing the power of the human spirit for—and in—all of us. In the course of this curriculum, we are using servant leadership to describe an approach to leadership that serves, facilitates, and collaborates to make our communities work better for all.

Let us begin with answering the question—What is this new type of leadership that we see for our participants? We need community leaders who choose to serve first, and then lead, as a way to expand service to individuals and institutions. These leaders see the big picture, work for the common good, and do not serve a personal agenda. Most important, servant leadership is a new way to approach community leadership. Acting as a servant leader means that each person is concerned about how well the group functions and how each person in the group develops and is able to contribute to the work of the group. A servant leader is "other" centered not self-centered. See www.greenleaf.org for more information.

Understanding This New Approach to Leadership

Feeling more and more comfortable as a twenty-first century leader is a vital part of the ongoing learning process. Many or at least some of your participants will not think of themselves as leaders in the traditional sense. Therefore, you should be looking for different applications and resources that deepen their understanding of the concept. Each time you discuss servant leadership with the class, add more of these ideas. Juana Bordas, founder and president of Mestiza Leadership International, has studied the concept of servant leadership in different cultures. "Servant leadership has roots in many indigenous cultures—cultures that were holistic, cooperative, communal, intuitive, and spiritual. In these cultures, leaders were caretakers of the future, building on the legacy of the ancestors who walked before."

Your class participants have probably remarked about issues caused by misunderstandings of cultural, racial, and ethnic perspectives. Juana Bordas' work can be a catalyst for fruitful discussion about how a servant/collaborative leader can bring different groups together for the common good. There is a natural connection for her between the attitudes and practices of servant leadership and multi-cultural understanding. It is important that your group understand the broad concept and underlying values of servant leadership.

As reported in an *Indianapolis Star* staff report, "The servant leadership concept was coined more than twenty-five years ago in an essay by Robert K. Greenleaf, a former AT&T executive. Often considered the conscience of AT&T after retiring, he launched a second career as a writer, speaker and leadership consultant. His essay focused on his reading of Herman Hesse's *Journey to the East*. In the novel, the character Leo, seemingly a mere servant, joins a group of men on a journey. He does the lowliest of chores for them but also buoys them with his good spirits and song. When Leo disappears, the travelers can't go on without him. Even though he was a servant, Leo was their guiding spirit, their noble leader" (April 26, 1998).

In Don Frick's authorized biography of Robert Greenleaf, he analyzed Greenleaf's life and writings in terms of skills and capacities.

1. Listens to understand the other person's attitude
2. Uses power ethically
3. Seeks consensus in group decisions
4. Practices foresight to see clearly where it is best for the group to go
5. Uses language in a way that "connects the verbal concept to the hearer's own experience"
6. Withdraws, reflects, and reorients oneself
7. Practices acceptance and empathy
8. Conceptualizes first by seeing the whole and then states and adjusts goals, evaluates, analyzes, and then foresees contingencies along the way
9. Nurtures community
10. Chooses to lead

Here are Juana Bordas' necessary steps to enhance our capacity to appreciate and honor differences. These steps are based on Robert Greenleaf's writings:

- Be yourself. Honor your heritage. Explore and take pride in your own culture. Share and celebrate your background with others.
- Work towards synthesis—not sameness. Synthesis occurs when the best each of us has to offer is integrated into shared action or the final product.

- Express appreciation. Share praise, approval, encouragement, and support.
- Encourage inclusiveness. Take the initiative to get to know all types of people who work in your organization and reside in your community. Then, make sure diverse people and perspectives are included in meetings and projects.
- Educate yourself about key differences in others. Share information, resources and cultural and ethnic activities that will broaden your understanding and perspective.
- Be open to other points of view. Show others the respect you would like. Respect goes a long way in promoting understanding.
- Practice empathy as reflected in the Native American adage: "Do not judge until you have walked in their moccasins for many miles." Greenleaf wrote: "The servant always accepts and empathizes—never rejects."
- Be willing to listen attentively. Greenleaf advised servant leaders to practice the 'sustained intentness of listening.' This is critical, particularly when communication styles and cultural assumptions are different. Ask for help, clarification, and coaching in learning how people can best hear you or want to be addressed.
- Realize diversity is a journey we are making together. Be patient and tolerant with yourself and others.
- Start with yourself first. Make a commitment to be a role model for valuing diverse perspectives.

How Will We Develop This New Model of Leadership?

"I can't emphasize strongly enough that we're at a historic moment. The next America is going to be forged at the grassroots. It's going to emerge from the communities of our great nation." This prediction by John Gardner frames a great responsibility and a wonderful opportunity for community leadership programs. We must prepare the people who will "forge the next America—and the new world."

How do we build new leadership capacity? As you have the discussion in your group steer it with the end you have in mind. Ask yourself, "What is the product we want from our leadership program? What do you want participants to be like when they leave this training? What are their expectations for their community and for themselves?"

Based on experience with other Kansas groups, leadership training needs to develop people who want to serve their community. According to Robert Greenleaf, "People who want to serve first—people who serve out of a personal mission—people who are stewards of their community—are inclusive—are process facilitators—can empower others—foster creative thinking—understand the power of vision—are change agents" Peter Senge tells us that leaders need to be facilitators, stewards, coaches, designers, and teachers. This is your program goal—this is the end product.

However, knowing the kind of leader we will need for the future is the easy part of the task. Knowing how to create this leader is the challenge. To develop the twenty-first century leader who has a new attitude and set of skills and capacities will take a different kind of training. It will take less mind stuffing and more mind and relationship building. The old standby, community awareness, may still be present, but it will no longer dominate the curriculum. The training will lead with the new capacities and use community information when appropriate to teach the leadership skills. We must develop the new capacities to actually meet the challenges.

Learning Styles and Your Leadership Program

As you begin your training it is important to be aware of how people learn. Louis Cassels' article in *Nation's Business* provides good rules for learning that can help you and your participants prepare as learners.

- People must want to learn.
- People will learn only what they feel a need to learn.
- People learn by doing—they must be actively involved.
- People learn best in an informal setting.
- Experience affects learning.
- People learn best when given a real-life problem to solve.
- A variety of methods should be used in teaching.

Educator Malcolm Knowles summarizes the theory of learning of KCLI when he says it should be "life-centered, task-centered, and application-centered." Understanding how people learn and work are keys for your leadership program. Knowing how to make your community, your leadership program, your board, or your family work more effectively requires knowing how people work, learn, and make decisions.

Right Brain vs. Left Brain

Definition: This theory of the structure and functions of the mind suggest that the two different sides of the brain control two different "modes" of thinking and how we learn. It also suggests that each of us prefers one mode over the other. The following table illustrates the differences between left-brain and right-brain thinking:

Left Brain	Right Brain
Logical	Intuitive
Sequential	Random
Rational	Holistic
Analytical	Synthesizing
Objective	Subjective
Looks at parts	Looks at wholes

Most individuals have a distinct preference for one of these styles of thinking. Some, however, are more whole-brained and equally adept at both modes. In general, schools tend to favor left-brain modes of thinking, while downplaying the right-brain ones. Left-brain scholastic subjects focus on logical thinking, analysis, and accuracy. Right-brained subjects, on the other hand, focus on aesthetics, feeling, and creativity.

It used to be thought that everyone learned in the same way. Our schools, for the most part, are still designed on that premise. However, today we now understand that people learn differently, and this difference is significant in the way they function with others. Learning styles make a major difference in the way we work in a group. This is why it is so significant that your participants understand their own learning style (and why they function the way they do) and the learning styles of others. You will address learning styles in depth in Unit Two, but it is important that you present the general idea in Unit One. People take in information and make it theirs (or process it) in different ways.

The way we think and process information can affect how we work with others in a community. The old adage of "the process people and the product people" takes over when people who have different modes of thinking tackle issues together. It is important for groups to have this self-awareness and begin to manage the reality. While there will be more discussion about different learning styles in later units, you will want to alert your participants to the difference in learning styles early in their program.

Building Trust in the Group as You Get Started

Trust is the foundation of an effective group. Without trust we are reluctant to share our ideas, our thoughts, ourselves. To risk, or make oneself vulnerable, doesn't happen easily without trust. We often think of trust as an either "do or don't do" situation. We either trust Jennifer or Doug, or we don't. However, trust is something that can be developed among people. It takes time and much effort, but it is well worth it when developing a performing team, and it is vital when moving through chaos.

When we walk into a group of people who do not know each other or doubt the sincerity or integrity of others in the group—or simply do not trust each other—we know that the first task is to establish trust. Once we trust each other, we are able to risk, to talk about the hard issues, to challenge each other, and be challenged. The question then becomes—can you build trust in a group? And, if you can, how?

Give your participants the space, place, and time to build trust. It takes all three ingredients. Unit One sets the stage for this trust. Do not rush the time and opportunity your participants have to get to know each other.

This background sets the stage for you to facilitate Unit One. Your group will be eager to get started, meet one another, and understand their joint task for this leadership program. Encourage conversation and personal reflection when you can, recognize the difference in the way people process information and in what they bring to the table, and most of all, have fun.

Gathering to Learn about Leadership

Learning Objectives

- Provide an opportunity for participants to begin to get to know one another
- Introduce the concept of servant leadership
- Introduce steps to a performing community and provide the launching point for reinforcing this concept in every session

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Other Purposes of the Session

- Create excitement about the community
- Invite participants to be involved in leadership roles
- Describe effective twenty-first century communities and the kinds of leadership capacities needed in them

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Before the Meeting (facilitation supplies and materials needed)

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Premade Flip Charts

Create large charts or posters including these items. If handled with care, these premade flip charts can be used on the walls at each succeeding session.

- Twenty-first Century Performing Communities
    - Twenty-first century communities are leader-full; everyone is a facilitative, collaborative, servant leader
    - Twenty-first century communities act and think like a community. There is a high level of trust and respect with a sense that 'we are all in this together'
    - Twenty-first century communities work for the residents. People have direct contact with dreams and issues that concern them
    - Twenty-first century communities are rich in collaborations and partnerships
    - Twenty-first century communities have processes in place that:
        - Provide an environment for problem solving that is flexible and forgiving
        - Enable people to analyze and solve problems to achieve multi-perspective creative solutions

- Enable people to build consensus and coalitions within an uneven balance of power
  ° Twenty-first century communities have:
    - An identification of shared values
    - A steady focus on the common good
    - The creation of a shared vision of the preferred future
    - Action toward that vision
  ° Twenty-first century communities celebrate and appreciate.
    (Mary Jo Clark & Pat Heiny)

- Twenty-first Century Facilitative Leaders
  ° ARE SERVANT LEADERS
  ° SERVE OUT OF PERSONAL MISSION
  ° DEVELOP PEOPLE
  ° DEVELOP PERFORMING COMMUNITIES
  ° ARE INCLUSIVE
  ° USE CONSENSUS
  ° BUILD COLLABORATIONS
  ° LEAD TO A SHARED VISION
  ° FACILITATE FROM THE SIDE OF THE ROOM
  ° ARE CHANGE AGENTS

"Servant leaders use their gifts and talents to create a civil, compassionate world for all."
  —Mary Jo Clark & Pat Heiny

- The Best Test of Servant Leadership
  "Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants?"
    —Robert Greenleaf

- Steps to a Performing Community (large version of Handout #2 page 3 diagram)

- Tool Box Framework
  ° The Tool Box is a chart or page on which you will add new tools, concepts and processes as the class learns about them. It should be part of each session. Either as part of debriefing during the class session or between sessions, the new items should be added. It may be helpful to divide the tool box into the four stages of a performing community and add each tool into the quadrant to which it most contributes. Another approach is to divide the chart into the number of sessions your class meets and add tools in the order they are presented.

Handouts

- Overview for Participants
- Participant Agenda (You may wish to also provide an overall agenda or schedule for the entire class, including meeting dates, locations, guidelines about how to dress, topic areas and expected guest presenters.)

- Participant Handout #1 Understanding New Approaches to Facilitative Leadership
- Participant Handout #2 Steps to a Performing Community
- Participant Handout #3 Experiential Learning Cycle

Supplies

- Snacks
- Nametags
- Greeters to help make participants comfortable
- Small notebook (optional) for each participant in which to record acts of Servant Leadership
- Flip charts, white paper, or large self-adhesive chart paper
- Sticky notes, markers, and note cards
- Pens

Creating the Environment

Suggested Theme

Choose a theme and use it throughout the room. Example: "Building a Community that Works" using construction objects. You might have Tonka trucks and hardhats on the table, blueprints on the walls, yellow tape, measuring tape to designate areas of the room, "Workers ahead" signs, orange cones, etc. One idea would be to contact a local construction company or your community road and bridge crew to set up a construction/demolition vehicle at the meeting site.

    If using this, explain how it connects: Laying out a blueprint for where you plan to go in the future, hardhats because there's going to be lots of difficult work involved, orange cones as guides can be moved if the path changes.

Room Setup

Tables with seating for 4-6 people set up so that it is easy for the participants to converse. Cover tables with bright colored paper, extra markers, an agenda for each participant, a quote (See Appendix A) at each person's place. Small quotes appropriate to the topic may be scattered on the table.

Session Script

Session Overview

Welcome and Overview	15 minutes
Building our Resume	60 minutes
Break	**15 minutes**
Servant Leadership—The Heart of Leadership	45 minutes
Our Community—A Good Place to Live	60 minutes
Break	**15 minutes**
Introduction to a Performing Community	60 minutes
Closing Circle	30 minutes
Total Time	**5 Hours**

As People Enter
30 minutes

Materials: Nametags and markers; map or photo with pins or sticky notes; premade flip charts with instructions.

Choose one or more of these activities to give participants something to do as they enter and begin to meet one another.
- Make (and decorate) nametags
- Provide markers and stickers to draw on paper on their tables
- Have a community map or aerial photo and ask participants to use pins or sticky notes to point out where they live/work
- Provide directional signs so that participants sit in mixed groups (i.e., no more than two from one town/employer)

Welcome and Overview
15 minutes

Materials: Agendas, participant overview and (optional) overview of the entire class

Welcome the participants. If appropriate, introduce special guests, the working committee, sponsors, etc.

Distribute agenda and describe briefly the day and the concepts to be covered:

Learning Objectives:
- Provide an opportunity for participants to begin to get to know one another
- Introduce the concept of servant leadership

- Introduce steps to a performing community

Other Purposes of the Session:

- Create excitement about the community
- Invite participants to be involved in leadership roles
- Describe effective Twenty-first century communities and the kinds of leadership capacities needed in them

Include overview of the upcoming session topics and their locations:

- Gathering to Learn about Leadership
- Seeing Yourself as a Leader
- Creating a Shared Understanding of the Past to Create a Shared Vision for the Future
- Practicing Consensus Building
- Collaboration
- Advocating for the Changes We Want
- Growing and Celebrating as Leaders
- (Optional) Class Celebration or Graduation Ceremony

Take time to cover logistics, such as where restrooms are, when formal breaks will take place, and where people may smoke. Remind people to turn cell phones and other electronic devices to a mode that will not distract the class. Let people know that they should take other breaks as needed but that keeping the group together as much as possible will facilitate learning.

Ask all class members to introduce themselves (name, town, occupation, volunteer role or whatever is appropriate for your class).

Building our Resume
60 minutes

WHY: When working with a new group, the initial goal is that the members can become comfortable with each other as soon as possible. The long-term goal is that all participants will build trust throughout the group so that they can tackle difficult community problems.

HOW:

Say: *Our community leadership experience is structured to allow us to get to know and learn from one another. This exercise is intended to help us start gathering purposefully and learn some of the strengths we each bring to the group.*

Materials: Flip chart or white paper for each group, non-permanent markers.
Provide possible props and music for creative presentations.

❶ Divide the class into teams of four or five

❷ Instruct the teams to spend a few minutes getting to know one another. (5 mins)

❸ Say: *Working in your teams, you are going to put together a "resume" of your team to introduce yourselves to the whole group. The "resume" should not be taken literally. We want something that will catch attention and be remembered. You should go beyond just*

"work experience." Be creative. Your resume should reflect the talents, skills and experiences that each participant brings to the group. Consider your education/train- ing, your relationships (past and present), your experiences and travels, and your tal- ents and hobbies. You will have thirty minutes to prepare your team resume, and your presentation should be 3-4 minutes long

4 Give the group 30 minutes to prepare a three to four minute presentation. During this time, reinforce that teams may be creative

5 Have teams present their resumes to the large group. (3-4 minutes each)

6 After the fun of the presentation, ask all of the participants to stand up and walk across the room to talk with someone they do not know. Do this two or three times. Allow a couple minutes for each conversation

7 Have the participants return to new tables (new groups of 4-6 people) to debrief the experience. Consider using some of these questions:
- How did your group approach its task?
- What new things did you learn about others?
- What resources exist within this class?
- Why is it important to begin with the assets of a group or situation?
- What other conversations do you want to have with other class members?
- How can you best help groups that you work with get to know one another?

Break	*(15 Minutes)*

Servant Leadership— The Heart of Leadership
45 minutes

Materials: Note cards, sticky notes, notebooks

WHY: Introduce the concept of servant leadership to the group. If one becomes a twenty- first century leader, actions such as working together, collaboration, consensus seeking, and empowering others become natural functions. Robert Greenleaf suggests we consider a "domain of leadership grounded in a state of being, not doing." He says, "The first and most important choice a leader makes is the choice to serve, without which one's capacity to lead is profoundly limited."

HOW:

1 Continue working in small groups of 4-6. Begin the activity by saying: *Think about leadership that has made a difference in a community you've been part of or leadership that has made a difference in your life. After a few moments of reflection, share your stories with each other around the table*

2 After the stories have been shared around their tables, as facilitator you can ask for some stories to be shared with the entire group

Record responses of qualities and characteristics on flip charts.

Premade flip chart: The Best Test for Servant Leadership, Participant Handout #1—Understanding New Approaches to Facilitative Leadership

3 Engage the participants in a large group discussion about their stories. Ask: *What were the leadership qualities and characteristics that made the experience possible for you?*

4 Introduce The Best Test for Servant Leadership and distribute Handout #1: *This concept was developed by Robert Greenleaf and is used in many cultures. Greenleaf tells us that a servant leader serves first and out of the act of service is given the honor to lead. The Best Test for Servant Leadership as stated by Greenleaf is: "Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants?" This means that each person we encounter, we work with, we have lunch with, we serve on a committee with, should come away a better person as a result of their time with us. We are responsible for helping others become as good as they can be.*

Circle or otherwise highlight responses

5 As a large group, look for common ground between servant leadership and the common themes already listed.

6 Discuss those leadership characteristics that don't necessarily fit into servant leadership / Tweny-first Century facilitative leadership. Ask: *How and when are those styles important?*

7 Discuss how the language of servant leadership can be charged in some groups. Say: *For historical and cultural reasons, some people are not comfortable with the term "servant leader." In particular, African-Americans in the United States may see negative connotations in the term. People who reject some religious traditions may find the language too suggestive of particular sets of beliefs. And people who have overcome issues around self-esteem and self-worth may see this language as pushing them back into a place they don't want to be. What are some alternate suggestions this class has for linking the concepts of service and leadership for those people who might not want to use the phrase "servant leadership?"* (Suggestions might include transformational leadership, facilitative leadership and collaborative leadership.)

8 Say: *Servant leadership is a state of being. It's not enough to have a servant's heart. You must have the competencies to exercise that leadership.*

(Optional) Small notebook for each participant to record observations.

As homework, ask people to record acts of servant leadership that they observe. Explain that these will be shared during an upcoming class session. Encourage them to observe others in the class and to watch for acts in their families and in the community. Also explain that we each should be conscious of functioning as a servant leader to help empower participants in the class to be the best they can be.

Our Community— A Good Place to Live
60 minutes

Materials: Materials: flip chart, non-permanent markers, sticky notes

WHY: Participants should leave excited about the opportunity to exercise leadership in their community. Motivation that participants gain is one of the key ways that community

members will assess the impact of your program, and it will also have much bearing on the amount of work and dedication that the participants will choose to put forth. This activity underlines the gathering stage as participants begin to hear what aspects of the community each one values.

HOW:

1 Choose one or more of these possible suggestions for motivating the group:

- Invite a person who is passionate about the community (and an exciting speaker) to do a short (depending on your time frame) presentation on "Five Reasons Why This is a Wonderful Community" or "Why This Community is So Special."
- Invite a panel of three or four diverse community volunteers or teens to talk about "Why I Serve" or "Why I Choose to Live Here" or "What is Great About our Community." Represent a diverse panel to capture a broad idea of who's in the community.
- Ask someone new to the community (and enthusiastic about it) to talk about why they moved there, the first impressions they have had, and what they are looking forward to.
- Invite a speaker who's recognized as a servant leader to speak about leadership & service in your place.

Sticky notes

2 At the end of the presentation, ask the group to join in to list one thing about the community each person really likes. List these on sticky notes and post around the room.

3 Discuss with the group the idea that what you like about your community may be the entry point for being involved in the community: Ask questions such as:
- How are you already involved in community life?
- What kinds of volunteer and/or leadership roles would be rewarding for you?
- What skills, if you learned or improved them, would better equip you to do that kind of work?
- What do you need to better understand about our community to provide leadership for it?
- How is this kind of positive discussion about our community different from your typical discussions? From what you see in the media? From what you hear from youth in the community?

Say: *You will have a homework assignment to build on the insights you've gained here. We'll ask you to build on this by answering what our community should keep doing. But we'll also acknowledge that even in this community we're proud of, we need to consider what we should stop doing—and also what we should start doing—to make our community more effective.*

Break	(15 Minutes)

Introduction to a Performing Community
60 minutes

Materials: Participant Handout #2—Steps to a Performing Community, flip chart

WHY: It is important that the group understands the need for a performing community and that the leadership program is organized to create a performing group experience. Participants need to understand that real work gets done when a group moves through chaos to unity and performance. Therefore, we want to introduce this in our first session. This is the time to introduce the characteristics of a performing community, the evidence of when it does or doesn't perform and the consequences of each.

HOW:

Handout #2, Steps to a Performing Community

1 Introduce the concept of Steps to a Performing Community. Distribute Handout #2 and explain briefly the four steps to a performing community or performing group. Tell the group they will be moving through these stages over the course of the program. In each following session you will describe what is happening and what is being done to move the group towards unity so they can duplicate this when they are working with groups in the future.

2 Ask participants to think of a group that works well. In small groups have them decide what they like about these groups. How would they describe the groups?

Record responses on a flip chart

3 Share ideas with the whole group. Record. (When possible, guide answers to use language similar to Handout #2.) You should now have a list of characteristics of a performing, effective group.

4 Post the characteristics of a performing community on the wall. Compare to results of group process. Say: *We are going to be a "practice" performing community, intentionally going through the stages and calling out what we're doing along the way. Given that, let's look again at the sessions coming up and how they fit into the Steps to a Performing Community.*

- GATHERING
    1. Gathering to Learn About Leadership
    2. Seeing Yourself as a Leader
- MANAGING CHAOS
    3. Creating a Shared Understanding of the Past to Create a Shared Vision of the Future
    4. Practicing Consensus Building
- UNITY
    5. Collaboration
    6. Advocating for the Changes We Want
- PERFORMING
    7. Growing and Celebrating as Leaders

5 Describe what you did in this initial session by explaining the gathering stage in more depth. For example:
- You gave the group an overview of what will happen in the leadership program.

- You described twenty-first century facilitative leadership qualities and characteristics.
- You introduced the concept of Steps to a Performing Community and modeled that framework as you facilitated their meeting other people through intentional, planned activities, questions, and putting them in small groups.
- You introduced the concept of servant leadership and shared stories about servant leadership.
- You motivated them to be excited about their community, take pride in it and to obtain the new capacities to make it a better place.
- You encouraged them to keep what they learned in mind and to use it when working with other people.

Say: *One of your homework assignments must be done with other class members. The community visit is designed to get the group out into the community to explore places and things they have not experienced and to find more things to be proud of. It also gives you another small group to get to know. This helps build the performing community. An afternoon with two new people exploring the community brings people together in unique ways.*

Closing Circle
30 minutes

Materials: Flip chart, markers

WHY: Why have a closing circle? It is good for the participants to see themselves as a group and it is an easy way to ask a question that each person will answer. This helps them reflect on what they learned throughout the day.

HOW:

Handout #3—Experiential Learning Cycle

Move group into a circle with one flip chart close to a facilitator or volunteer recorder. Provide everyone with Handout #3—Experiential Learning Cycle.

Begin with a lecturette on the experiential learning cycle, sometimes also known as the wisdom cycle:

In the mid '70s David Kolb formalized a highly effective way of thinking about how we learn from experience. He described this as a cycle with four stages:
- *Planning and preparing*
  - *Identifying a gap between our present state and our desired state represents a need.*
  - *Planning some activity and identifying the resources required to meet that need.*
  - *Specifying the criteria and evidence that will let us know it is being met.*
- *Action*
  - *Engaging in the activity.*
- *Reflection*
  - *Reflecting on that experience and gathering information.*
- *Concluding*
  - *Generalizing and internalizing what happened in that experience.*
  - *Comparing our present state and desired state using the evidential criteria, and using these conclusions to carry on to a further stage of preparing and planning.*

The reason we discuss, or "debrief" almost every activity and we begin and end each session with discussion, is to ensure that we get the group to the reflection and concluding step. If that does not happen, then all the effort you invest in having an experience is incomplete— you might even say wasted—because the learning cycle is not complete.

Ask each person to reflect on and then answer the question: "What did I learn about leadership and/or myself during this session?" Give each person an opportunity to give a brief answer.

Follow-up question: Think about the room environment today (for instance, the construction theme): How did those decorations reinforce what you've learned?

GIVE A BRIEF INTRODUCTION TO THE NEXT UNIT.

Learning Objectives of Unit 2:
- Understanding self
- Understanding others to create the best group result
- Building trust and relationships within a group setting

REVIEW/ASSIGN HOMEWORK:

For most sessions, there will be a modest amount of outside work assigned. This session has more than most. These assignments need to be completed before session three, when we will begin shaping your class vision for our community.

❶ To further reinforce gathering, observe your community with new eyes. Visit two places in the community you have not previously experienced. Do this with two or more members of this class (preferably people you have not previously known). Bring back evidence of your visit. Arrange this before you leave the first session. This should be completed before session three (vision).

❷ The second assignment begins the process of integrating the concept of servant leadership into our mindset. We need to know what a servant leader is, be able to identify servant leadership in others, and then model servant leadership in our own everyday lives. As mentioned in servant leadership discussion, observe acts of servant leadership and record them in your notebook. Be prepared to share these with the group in future sessions.

❸ The third homework assignment will be for each person to answer three questions: What should we stop doing? Keep doing? Start doing? to make our community more effective.

Since you want to ensure that class members are using the tools and capacities in their daily life, remind them each time to think about their day-to-day work in terms of the capacities that were discussed during the session.

Understanding New Approaches to Facilitative Leadership

Twenty-first century leadership encourages:

- Collaboration
- Trust
- Foresight
- Listening
- Ethical use of power
- Empowerment

"The servant leader is servant first. It begins with the natural feeling that one wants to serve … then conscious choice brings one to aspire to lead."

    —Robert Greenleaf

Facilitative/Servant Leadership is:

- A practical philosophy which supports people who choose to serve first, and then lead as a way to expand service to individual and institutions.
- A way of being in a relationship with others.
- A very personal and inward journey.

Twenty-first century leaders will:

- Let go of ego
- Become a good follower first
- Build positive relationships
- Work with excellence
- Rely on personal discipline, not emotion
- Make adding value a goal
- Help people live better lives and reach their potential
      —John Maxwell, *The Right to Lead*

"Servant leadership deals with the reality of power in everyday life—its legitimacy, the ethical restraints upon it, and the beneficial results that can be attained through the appropriate use of power."

    —*The New York Times*

The Best Test for Servant Leaders:

"Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants?"

    —Robert Greenleaf

Steps to a Performing Community

The development of a performing community is important if members are to try new things, wrestle with tough issues, and take risks. A performing community built on trust and respect is important not only to get group work done but for individuals to develop their own gifts and talents. There are four distinct steps to a learning community—Gathering, Chaos, Unity, and Performing. To develop a learning community, a group must go through these steps in order. However, the steps are not static. Each group moves in and out of these steps depending on the task and circumstances. These steps apply for all groups, from committees to boards to companies to leadership classes to families. This knowledge then becomes important as you think about your role in all kinds of groups. The goal is to help groups get to and operate as a performing learning community. Let's look at each of the steps.

Step One—Gathering

In the gathering stage, people feel excited and anxious, also uncertain, cautious, fearful, and confused. Members depend on the leader for structure and a safe environment. Clear expectations and directions, name tags, and refreshments will help put people at ease. At this time, participants are not very open. There is concern for personal identity—people will wonder if they belong. Conversation is guarded and polite on subjects such as the weather, sports, current fashion. Participants wonder: What is this group's purpose? What's in it for me? Do we have a leader? Why did my boss make me come to a leadership program? The group accomplishes little, if anything, that concerns its project or work. They cannot discuss serious community issues. Many community groups begin discussing serious community issues during this step: the result is confusion and anxiety. Make the group feel comfortable and provide a structure for them to get to know one another then the group will move naturally to the next step.

Step Two—Chaos

At this step people are jockeying for position. They may feel stressed, left out, and competitive. They want to know where they fit in this group. They may try to take charge of the group. They do not listen well, calling on previous experience to impress the other participants. They question tasks; they question the leader, they just question. Very often one person tries to dominate the group, and because the other members are not feeling confident about their skills or their role, the group will let that person rule. There is even choosing of sides. During this time there is a lot of joking at others' expense and one-upmanship. The behaviors are a smoke screen as people try to find out who has the power, how they will fit into the group, and whether the group can work together. People need time to work out their relationships with others. This is an important time for any group. This is a tough step. Here are some suggestions to move the group beyond chaos:

- Help the group discover its vision. As a part of that process use a timeline. Timelines let group members share personal stories with one another in a non-threatening way.
- Use small group activities and have them change groups often. They need to get to know one another well enough so they can begin to communicate.
- Ensure that each person sees her/his role on the team. Make sure that he/she understands his/her own gifts and talents and that what she/he brings to the table is a necessary part of the whole. Learning styles are a way for people to learn to respect one another.
- Empower the group with skills and training. Set up an expectation of servant leadership. Teach the steps to a learning community as an expectation and a responsibility for them as they participate in the group.

Step Three—Unity

In unity, people feel part of a team. There is cohesion, cooperation, optimism, respect, and trust. The group begins to relax. People know each other well, know what they can contribute to the group, and therefore, they encourage and support each other. Humor is plentiful and friendly. At this time there is powerful interaction in the group. People are honest and can give constructive criticism. They understand each other's perspective. In this stage, members are asking, are we working together to reach our goal? Can we switch roles? Can I lead?

Step Four—Performing

By the time a group enters the performing stage, people are comfortable with their own roles. They understand what is expected of them and what they can do even without the group. They show confidence, commitment, and enthusiasm. They feel comfortable enough in the group that there can be constructive self-change and members can take risks. They enjoy the satisfaction of the team's progress. As they move through various tasks, different members assume leadership roles; therefore, roving leadership is important. When a group is performing, you can have full-group, productive discussions about tough issues. The group will also be able to carry out joint projects.

These steps and stages are not static. Every group moves in and out of these steps depending on the addition of new members, the challenges of new tasks, and the amount of time between sessions. We know, however, that the recurring time spent in the early steps is lessened once you have been able to get a group to the performing level. During this session, the class will experience moving through the steps and then spend time debriefing the process so that they will have the skills to help every group in which they participate.

Why Are We Here?   Gathering

1

Make Name Tags   Introductions
Refreshments   Information
Leader Directed   Agenda
Welcoming Environment
Clear Expectations and Directions

What is Our Purpose?   Chaos

2

Mission   Timeline
Role in Group   Gifts and Talents
Share Personal Stories   Vision
Mirroring   Teach Processes
Learning Styles   Consensus
Small Group Interaction   Collaboration
Steps to Performing Community   Develop Self-Esteem
Expect Servant Leadership

How Will We Do It?   Unity

3

Celebrate Diversity   Develop Vision
Work Out Differences   Interaction of All
Mirroring   Multiple Lenses
Use Processes   Fun Together
Focus on Task   Plan Steps of Task
Apply Skills with Debriefing
Appreciate and Enjoy Each other

What's Next?   Performing

4

Roving Leadership   Encourage
Problem Solving   Self-Change
Hold People Accountable   Take Risks
Facilitate from the side of the room   Teach Each Other
Evaluate Work and Processes
Celebrate Teams Accomplishments

Experiential Learning Cycle

In the mid '70s David Kolb formalized a highly effective way of thinking about how we learn from experience. He described this as a cycle with four stages:

1. Planning and preparing

Identifying a gap between our present state and our desired state represents a need
Planning some activity and identifying the resources required to meet that need
Specifying the criteria and evidence that will let us know it is being met

2. Action

Engaging in the activity

3. Reflection

Reflecting on that experience and gathering information

4. Concluding

Generalizing and internalizing what happened on that experience
Comparing our present state and desired state using the evidential criteria, and using these conclusions to carry on to a further stage of preparing and planning

Source: Scaling the Heights, UK

Unit One Extras and Additional Materials

If you want more context ...

Additional or alternate handouts

- Unit One Alternates Handout #1—Characteristics of a Performing Community
  This handout is used to reinforce the characteristics of a performing community. It is found behind this section.

Lecturette: Connecting Servant Leadership to Diversity/Inclusivity

- ALTERNATE ACTIVITY for connecting servant leadership to inclusivity:
  These are steps to enhance our capacity to appreciate and honor difference by Juana Bordas and based on Robert Greenleaf.
  - ° Be yourself. Honor your heritage. Explore and take pride in your own culture. Share and celebrate your background with others.
  - ° Work towards synthesis—not sameness. Synthesis occurs when the best each of us has to offer is integrated into shared action or the final product.
  - ° Express appreciation. Share praise, approval, encouragement, and support.
  - ° Encourage inclusiveness. Take the initiative to get to know all types of people who work in your organization and reside in your community. Then, make sure diverse people and perspectives are included in meetings and projects.
  - ° Educate yourself about key differences in others. Share information, resources, cultural and ethnic activities that will broaden your understanding and perspective.
  - ° Be open to other points of view. Show others the respect you would like. Respect goes a long way in promoting understanding.
  - ° Practice empathy as reflected in the Native American adage: "Do not judge until you have walked in their moccasins for many miles." Greenleaf wrote: "The servant always accepts and empathizes—never rejects."
  - ° Be willing to listen attentively. Greenleaf advised servant leaders to practice the 'sustained intentness of listening.' This is critical, particularly when communication styles and cultural assumptions are different. Ask for help, clarification, and coaching in learning how people can best hear you or want to be addressed.
  - ° Realize diversity is a journey we are making together. Be patient and tolerant with yourself and others.
  - ° Start with yourself first. Make a commitment to be a role model for valuing diverse perspectives.

Suggested Time: 10-15 minutes

Lecturette: Steps to a Performing Community

To review these steps say:

- **Gathering**—*In the gathering stage people feel uncertain, cautious, fearful, confused, anxious, and excited. They depend on the leader for structure and a safe environment. At this time, participants are not very open. There is concern for personal identity—people will wonder if they belong. Conversation is guarded and polite—focusing on the weather or sports. Participants wonder: What is this group's purpose? What's in it for me? Do we have a leader? The group accomplishes little, if anything, that concerns its project or work. If you have made the group feel comfortable and provided a structure for them to get to know one another, the group will move naturally to the next step.*

- **Chaos**—*At this step people are jockeying for position. They feel stressed, left out, competitive. They want to know where they fit in this group. They do not listen well—calling on previous experience to impress the other participants. They question tasks; they question the leader; they just question. Very often one person tries to dominate the group, and because the other members are not feeling confident about their skills or their role, the group will let that person rule. There is even choosing of sides. During this time there is a lot of joking at the others' expense and one-upmanship. The behaviors are a smoke screen as people try to find out who has the power, how they will fit into the group, and whether the group can work together. People need time to work out their relationships with others.*

- **Unity**—*In unity, people feel part of a team. There is cohesion, cooperation, optimism, respect, and trust. The group begins to relax. People know each other well, know what they can contribute to the group, and therefore, they encourage and support each other. Humor is plentiful and friendly. At this time there is powerful interaction in the group. People are honest and can give constructive criticism. They understand each other's perspective. In this stage, members are asking, "Are we working together to reach our goal? Can we switch roles? Can I lead?"*

- **Performing**—*By the time a group enters the performing stage, people are relaxed with their own role. They understand what is expected of them and what they can do even without the group. They show confidence, commitment, and enthusiasm. They feel comfortable enough in the group that there can be constructive self-change and members can take risks. They enjoy the satisfaction of the team's progress. As they move through various tasks, different members assume leadership roles; therefore, roving leadership is important.*

Suggested Time: 10-15 minutes

After Introducing the "Best Test" Quote

Add this step for groups who are really new to this concept: "When you think of the term 'servant leadership,' what other words or phrases come to mind?"

Suggested Time: 5-10 minutes

If you want to increase knowledge of/interaction with the community ...

Participants' Work and Volunteer Environments

- This out-of-class assignment is used to reinforce and apply knowledge of Steps to a Performing Community.
  - ° Observe groups that you are in. Reflect on what you learned today about a performing community and consider what stages these groups are in. Journal assignment or requirement to post on class wiki related to this question.

No suggested time, but recommended debriefing of homework in Unit 2.

- Servant Leaders in Your Community
  - ° Establish the "Servant Leadership Wall." Ask the group to collect the names of the servant leaders identified each week. Provide a small notebook for on-going recording and/or start a class blog or wiki as a place to record their thoughts. List their servant leader examples on a large chart that you bring back to each session. This "Servant Leadership Wall" will be a graphic reminder of the diversity of those who are servant leaders.

Suggested time: 5-10 minutes per session.

  - ° After identifying acts of servant leadership through homework, class discussion, and/or the "Servant Leadership Wall," class members send these people notes of appreciation. Explain in the notes what a servant leader is and that the class has identified the recipient as one. This produces amazing results in the community and for your leadership organization. Be sure to debrief this activity in future units if you select it.

Suggested time: Homework: 5 minutes; In-class: 20-30 minutes.

Lecturette on trends in changing communities

May provide context for the purpose of the community leadership program and/or the emphasis on facilitative leadership. It could also be used as advance reading before Unit 1.

- Communities are different than when most of us grew up—they have more challenges and more opportunities. Some of what worked in past decades is not appropriate for today and tomorrow. However some of the values and priorities we have always had remain firm. As we create our new picture of our communities as effective twenty-first century communities, we need to put it in a larger context. As your participants think about their work as leaders in their community, it is important to be aware of how things are changing, what needs to change, and characteristics of a performing community. Here are six trends that illustrate the changes we have experienced or will experience. There may be others that relate specifically to your circumstances.

- **New economy**—Our communities used to be supported by local or regional businesses that were tailored to the economy of the area. Whether it was the local bank or hardware store, communities and their citizens knew the owners and where the available jobs might be. No longer are things quite so neat. Many of our formerly locally owned businesses are owned elsewhere. Computerization has reduced the need to be in a particular geographic place. The local workforce can work globally. Farm and manufacturing work operates on fewer employees, more machines, and less brawn. Thomas Friedman wrote in his book, *The World is Flat*, "If you want to grow and flourish in a flat world, you better learn how to change and align yourself with it." What has the changing economy meant for this community?

- **Global security**—After the devastation of September 11, 2001, our lives changed forever. Increased security meant longer lines at airports and train stations. We also know that we are vulnerable to outside influences that we were unthinkable a decade ago. We are more cautious and in some cases more intolerant of differences. How have the threats of global security affected this community?

- **Changing demographics**—America is a land of immigrants. From the nineteenth century influx of Italians, Irish, Polish, and Germans to the more modern day immigration of Hmongs, Latinos, Afghanis, and Sudanese, America is feeling the changes that come with different cultures and different ideas. By the year 2020, it is estimated that one-half of the growth in America's workforce will be Hispanic. Kansas is considered to be a growth state for Hispanics with a 200 percent increase in the Hispanic population but less than 200,000 in actual individuals. What is the diversity of our community now and how can we insure that we are preparing all our residents to participate in an effective twenty-first century community?

- **Building a new workforce**—In Richard Florida's book, *The Rise of the Creative Class*, he challenges the way communities look at quality of life and economic development. He has found that 30 percent of our workforce is involved in work that he terms "creative". He believes that businesses will just keep increasing this percentage. According to Florida, "to attract and sustain such workers and companies we must build a community that is tolerant of all lifestyles, one that fosters and supports creative work." Is our community a tolerant, welcoming place? How are we positioning our community in the creative economy?

- **Ethics**—Integrity has taken a bashing as we look at corporate and government scandals of late. What happened to honesty and fairness? Our communities are only as strong as each sector. We count on our small businesses, corporations, and our nonprofits to share in community life. This leads to another current reality—accountability. From education to social services to our workplaces to city hall—we are asked to perform and perform well. Is our overemphasis on performance guiding the way for ethics breaches? Are we making people think that results are easy and do not require the hard work that we know is required? Is there evidence of this in our community?

- **Aging population**—Along with the changing ethnic diversity in the country, we can also expect an older one. As people live longer and retire earlier, our communities are likely to have a wealth of older citizens with time and experience. The baby boomers are an asset to attract. How can this resource be used to make our community more effective as we move

into the twenty-first century?
- What other trends do you see changing our community? Our state?
- Given these trends and the headlines taken from today's news, how should healthy communities function? What are the characteristics of an effective community for this current environment? As our world has evolved, so have our definitions and expectations of community participation, philanthropy, and effectiveness. In the last decade of the twentieth century we began looking at community success with new eyes and new expectations, and we continue to build on what we learned. Current community challenges call for new ways of working together.

Suggested Time: Lecture: 10 minutes

If you want an energetic activity ...

Alternate activity for "Our Community—a Good Place to Live."

In addition to what people like about the community, have participants write sticky notes about where they work in the community, where they volunteer, and where they live in the community. Have participants place the sticky notes on the wall in those categories.

Suggested Time: 10-15 minutes.

If you want to ask more questions ...

Questions to use to assist in introducing Steps to a Performing Community

In small groups, have class members consider and record their answers to the key questions of Steps to a Performing Community.
- Gathering: Why am I here and what do I have to contribute?
- Chaos: What is our purpose?
- Unity: How will we do it?
- Performing: Do it... What's next?

Report back to the large group.
Debrief questions might include:
- How difficult was it to project what unity and performing might be like?
- What talents and perspectives of other participants did you learn as you answered the gathering questions?
- What's taking shape for you as the purpose of this learning community?

Suggested Time: 10-15 minutes

Questions to use in closing circle

Other end-of-the-day debrief questions can be used, such as:

- How were you feeling when you came into the day?
- Which elements of gathering helped/hindered your ability to be comfortable/productive today?
- How could you use concepts introduced today in your (work/family/volunteer) roles?
- What about today was challenging for you?
- What would you like to learn more about/better understand?
- What will you tell your (employer/sponsor/family) about today's session?
- What expectations do you have for the remaining sessions that facilitators/organizers should know about?

Suggested Time: 30 minutes

Characteristics of a Performing Community

Performing Twenty-first Century Communities

- Performing Twenty-first century communities are leader-full; everyone is a facilitative, collaborative, servant leader.
- Performing Twenty-first century communities' act and think like a community. There is a high level of trust and respect with a sense that 'we are all in this together'.
- Performing Twenty-first century communities work for the residents. People have direct contact with dreams and issues that concern them.
- Performing Twenty-first century communities are rich in collaborations and partnerships.
- Performing Twenty-first century communities have processes in place that:
  - Provide and environment for problem solving that is flexible and forgiving.
  - That enable people to analyze and solve problems from and with multi-perspective creative solutions.
  - That enable people to build consensus and coalitions within an uneven balance of power.

- Performing Twenty-first century communities have:
  - An identification of shared values
  - A steady focus on the common good
  - The creation of a shared vision of the preferred future
  - Action toward that vision.

- Performing Twenty-first century communities celebrate and appreciate.

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"In leaderful communities, everyone is an important player. Leaderful communities include the development of new practices of deliberation…and changes in the way the community goes about solving its problems—problem solving that focuses on a community's efforts to draw on the strengths of many in complimentary ways".

—MAXINE S. THOMAS, *Secretary and General Counsel. Kettering Foundation*

UNIT TWO

Seeing Yourself as a Leader

Overview

Purpose of Unit Two

Learning Objectives:

- Understand self
- Understand others to create the best group result
- Build trust and relationships within a group setting

Other Purposes of the Session:

- Continue to develop the group as a performing community
- Understand how stories build trust in relationships
- Develop concept of learning styles
- See self as a facilitative leader

In Unit One, participants learned about Servant Leadership, Steps to a Performing Community, and their Leadership Tool Box. Unit Two builds upon Unit One as participants begin to fill their Leadership Tool Boxes, identify examples of servant leadership, and learn about moving a group from Gathering to Chaos and the role of Chaos in Performing Communities.

Unit Two focuses on gaining an understanding of self and others that then contributes to an understanding of group dynamics and group functioning. Participants learn about building trust and building relationships and how stories play an integral role in that process. Participants also complete a Learning/Thinking/Working Styles inventory and discover how they and others in the group prefer to take in and use information.

Participant Agenda

I.	Welcome and Overview
II.	Filling our Tool Box–Building Trust–Building Relationships
	BREAK
III.	So, How do YOU Function in a Group?
IV.	Learning/Thinking/Working Styles
	BREAK
V.	So, Where is Our Group Now? Steps to a Performing Community
VI.	Closing Circle

Seeing Yourself as a Leader

Learning Objectives:

- Understanding self
- Understanding others to create the best group result
- Building trust and relationships within a group setting

Others Purposes of the Session:

- Continue to develop the group as a performing community
- Understand how stories and genuine listening build trust in relationships
- Develop concept of learning styles
- See self as a twenty-first century leader

Questions to be Addressed:

- Why is it important to really listen to people in my group or community?
- How do stories help people express their hopes, dreams, and fears?
- How do different learning styles affect community or group work?
- What does a performing community look like?

Unit Two focuses on building relationships and trust in the group. Collaborative and facilitative leadership will require better ways to relate to each other and work together. Using a variety of techniques including storytelling, listening, and learning styles, participants will begin to build a level of trust that will allow them to share their experiences and develop productive relationships for the community.

Participants will learn to look "from the balcony" to see how the whole community operates and begin to apply the concepts of twenty-first century leadership to their own way of working. Unit Two takes the leadership concepts presented in Unit One and brings them home—home to where participants live, play, worship, serve, and work.

Malcolm Gladwell in *The Tipping Point* says that change happens because we intentionally act differently in the places where we have influence. He believes that an individual's behavior can be altered by a new idea only if the person applies the idea to his/her real situation. In Unit Two participants will see how they can apply collaborative and facilitative leadership principles to every aspect of their lives.

Background for Lead Facilitator

Participants often realize their behavior has an impact on the groups they are in but they don't always understand how they can change that behavior for the good of the group. The leadership capacities introduced in Unit Two provide practical tools for participants to use in all of the groups in which they function.

In Unit One participants were asked to look at groups and determine their degree of effectiveness. In Unit Two, they will be asked to think again about ineffective groups that surfaced in Unit One. This visualization will most likely call to mind groups that are quite literally in chaos. These groups are characterized by protecting turf, confrontations only on e-mail, heated discussions after meetings in the parking lot, polarization, a lack of trust and positive relationships, or people dropping out of the group. Addressing these issues most often generates an obvious visible reaction from participants. Assessing this reaction allows participants to understand the importance of building relationships and trust.

Building Performing Groups

The current research on groups shows very clearly that if we want groups to work, we must intentionally build trust and positive relationships within the group. How do we do this? Every person has a story to tell about how these ideas work or do not work in real life situations. This is a good opportunity for relationship building and sharing among the group. No matter the size of the group, people can help build trusting, respectful relationships by:

- Thinking about their own attitude and perspective (servant leadership)
- Knowing how they personally communicate and function
- Allowing people to get to know one another
- Helping a group discover its shared history and common values
- Having the group articulate a unifying vision

CAUTION: Emphasize confidentiality throughout this session.

The good news is that common sense and collaborative leadership capacities of relationship building, listening, storytelling, and learning styles encourage these things to happen. These capacities used intentionally and purposefully will help move groups to a point where the people within the group feel confident and competent, trust is being built, and effective work is occuring. It will become apparent that a person does not have to wait until he/she is the CEO or the one with the gavel to accomplish this. It can be done by using the capacities discussed in Unit One and the impact that follows as a twenty-first century leader who facilitates from the side of the room. Unit Two focuses on using the four capacities of relationship building, listening, storytelling, and learning styles.

Understanding How Learning Styles Affect Our Impact

Knowing how people work, learn, communicate, and make decisions is vital to effective group leadership. While many participants will have done some sort of personality testing, those instruments do not seem to have lasting, practical value in helping groups work together better. The learning

styles tool that you will be presenting—The Egg—never fails to intrigue participants because very quickly they find out a lot about themselves and the people they live and work with. As the lead facilitator, it is fun to see the light bulbs come on when people finish scoring this instrument. This exercise builds on and deepens the understanding of learning styles introduced in Unit One.

How We Learn—Explaining Learning Styles

People take in information and make it theirs (or process it) in different ways. Various tools are available to determine how people learn. As you look at The Egg, consider the two halves created by the horizontal line. This reflects the different ways humans perceive, take in, or absorb information. Most people take in information in one of two ways, either through concrete experiences (talking to people, watching people, having real experiences, using their senses), or through abstract concepts (through books, experts). Most of us take in information in both ways, but you are asking at your participants about their first instinct, how they initially take in information. The upper half of The Egg indicates that the learners take in information through concrete experiences. Their reality is what they have experienced through their senses, through real life. They experience information through sensing and feeling. The lower half of The Egg represents those learners who perceive information through abstract concepts, through books and research. They absorb information in a conceptual format.

An Example of Learning Style Differences

How one takes in information is significant when working with people. Do they want to talk about something or must they read about it? In a seminar with bank employees, the administrative staff was asked if they had good communication with the bank. The administrative staff answered that communication was great—they explained that they sent out a newsletter every Monday morning. When the front-line employees were asked about communication, they answered: "It is terrible! They send us a newsletter every Monday. No one ever comes to talk with us." The communication was considered good for administrators. However, for most of the front-line employees who took in information through people, communication was terrible.

The second thing a learning style tells you is how people make information useful, what they do with information. Consider then the two halves of The Egg created by a line drawn vertically. This describes the different ways humans process the information once it is perceived. People whose figures fall on the right side of the bull's-eye reflect and observe. They make their mistakes in their head. They step back to gain perspective, they think through things. They make information useful by reflecting on it, thinking about it, working it through in their minds. These people want agendas; they want more time to think about topics; they want to work things through in their minds before they express their thoughts. They are reflective observers.

People on the left side are active experimenters. They immediately use whatever information they have gained. They apply the learning right away. The people on the left side of The Egg are doers who make information useful by doing something with it. They try out information, they experiment, they put information to work. These people are called active experimenters. If individuals initially reflect, they fall on the right side of The Egg. If the initial response is to act—they fall on the left side of The Egg.

Using Stories To Build Trust

In this discussion you will use storytelling, stories, and getting people to tell their own stories interchangeably. These words do not mean an entertainer who is relating stories but rather people sharing and telling their own personal experiences through stories.

Stories communicate ideas and information as no other medium can. Doug Stevenson, in his workshops on storytelling, says: "Stories connect with the heart, mind, and soul of the listener and appeal to all learning styles." Storytelling serves many purposes. It is key to building trust in a group. "We cannot hate a person whose story we know," organizational consultant Margaret Wheatley reminds us. When we share organizational or community stories it helps us discover the power of story to unify despite differences."

Stories create trust. Taking the time to build connections among people by getting them to tell their story is an important step in building trust. Robert Putnam and Lewis Feldstein in *Better Together* found that "telling and listening to stories created empathy, helped people find the things they had in common." When bringing diverse groups together, they found storytelling built the social capital necessary to get work done. Stories uncovered unifying themes and commonalities which then provided the reasons for people with different perspectives to work together.

Getting people to tell their stories requires genuine listeners, good questions, and a time and place to relax and enjoy. Ask questions that push people to reveal their personal feelings, but make sure you respect their privacy and sensitivity about certain things. As people share meaningful stories, most often listeners want to know more about the other person. We will find reasons to sit next to them, to share similar experiences, and to see if perhaps we have even more things in common.

Genuine Listening—An Essential Tool of The Storytelling Experience

What is genuine listening? Very simply, putting aside one's own agenda and interests and listening to the other person with the intent to understand, not to reply. If individuals are genuinely concerned and care about the growth and development of the other person, it becomes easy to listen with empathy. Margaret Wheatley goes even further: "When we listen with less judgment we always develop better relationships with each other. Curiosity and good listening brings us back together."

Michael P. Nichols, throughout the book *The Lost Art of Listening*, reminds us that listening has a couple of purposes. We all need to listen to take in information. The second reason is "to bear witness to another's expression." He cautions us that for so long we have acted as though we believe listening is just waiting so that we can say what we want to say. Moving beyond that practice requires intention, an attitude of openness, and knowing ourselves well enough that we can put immediate emotions on the back burner.

As you talk about genuine listening with the participants, point out to them that people feel honored and empowered when listened to. During this experience ask the group what they did that made listening a conscious choice. Remind participants that this is a wonderful, safe place to practice genuine and generous listening. This will be an important opportunity to ask participants to describe how they felt when they were really "heard" by another person and how the person conveyed this.

Building Relationships

Relationships are at the very heart of leadership and community and personal well-being. Dr. Bruce Perry, speaking at the 2005 Kansas Health Foundation Leadership Institute, stated: "Relationships are the most powerful tools of individual and systemic change." It is interesting to note that he was speaking to an audience of concerned Kansas leaders about the need to heed the developmental needs of children ages 0-5. He showed brain scans of relationally-deprived children and those who were well cared for and loved. There was a noticeable size difference.

While Dr. Perry was using science to prove the power of relationships, the Center for Collaborative Planning notes: "community development, or community building, depends on identifying, developing and sustaining relationships. Central to being successful in those relationships is community leadership." In *Better Together*, the authors found that relationship-building is vital in today's world. No one individual can achieve very much alone. However, relationship-building is not just a strategy to get people to do what you want them to do. It is an important new way of looking at people and at the world.

Use the Steps to a Performing Community to demonstrate the need for building relationships among people. (Refer participants to Handout #2 from Unit One.) As was explained in Unit One, a task is accomplished effectively and efficiently during the Performing Stage. Prior to that time, the function of the other three stages is basically to build trust and respectful relationships among the group members so they can eventually do the work confidently and competently.

Learning from a Past Session

In a recent workshop a participant remarked that others always told him that he really needed other people to get the job done and he couldn't assume that other people would work with him simply because he said so. He wasn't totally convinced this was true and behaved for the most part as though he could accomplish any and everything by himself. However, the graphic illustration of the Steps to a Performing Community caught his attention. He said excitedly, "look, three of the four steps—nearly three-fourths of the time to build a performing team—are all about people building trust and relationships." Needless to say he was very attentive as the capacities for building trust and relationships were described. For many workshop participants, the chart is the only justification you need for the power of building relationships. Author Scott Peck is even more precise saying that 80 percent of our time should be spent in building relationships and trust with the people with whom we are going to have to accomplish a major task.

What Does A Performing Learning Community Look and Feel Like?

Committed, caring people willing to use their gifts and talents. Shared vision based on values. The strength of the group follows the individual when working alone. Confidence in others on the team. Commitment and enthusiasm. WORK GETS DONE! Listening, collaborative, risk taking relationships based on trust and respect. Sense of solid accomplishments. High trust among members. Effective problem solving. Participants know their roles. Use of consensus to arrive at answers, solutions, decisions. Leadership is participatory, is collective, is roving, uses gifts. Ability to deal with complexity and change. Open sharing of information. Flexible Power and influence based on expertise and access to information—not authority.

The development of a performing community is important if members are to try new things, wrestle with tough issues, and take risks. A performing community built on trust and respect is important not only to get group work done, but also for individuals to develop their own gifts and talents. The learning styles information will help this process.

   As you taught in Unit One, there are four distinct steps to a performing community—Gathering, Chaos, Unity, and Performing. To develop a performing community, a group must go through these steps in order, but likely some, if not all, will be repeated. These steps apply for all groups, from committees to boards to companies to leadership classes to families. This knowledge then becomes important not only for you, the leadership development professional, but for each participant in your training. Plan to learn this, teach it to your planning committee, and then share it with your participants. The goal is to help groups become and operate as a performing learning community.

How Do We Create a Performing Community?

Using twenty-first century processes and capacities of visioning, learning styles, and empowering others, a group can move through the work of each step to become a performing community.
How do groups move through gathering?
  • Informal visiting time to reconnect
  • Humor and comfort can be good goals
  • Know your group and design the gathering to accomplish goals
  • Don't forget the need for formal intentional gathering
  • Share a meal

What causes a group to slide into chaos?
  • New topics or members are introduced
  • Tough questions are asked
  • Members who think: Why do we do it this way?
  • Members who say: Nothing will ever change.

How do you move a group through chaos to unity?
  • Build relationships
  • Acknowledge contributions
  • Remind them of gifts and talents
  • Teach learning styles

- Model/mirror behavior you want to see
- Eliminate win-lose situations
- Use small groups/partners
- Have expectations of behavior
- Model servant leadership
- Begin the steps to the Vision Process
- Build trust

These are the kinds of concepts the group will begin to understand and effectively use in Unit Two. Participants should have a solid exposure to learning styles and how those styles impact a performing community. As they remember or experience the stages of a performing community it is important to continually remind them that the process for change is both normal and predictable.

Seeing Yourself as a Leader

Learning Objectives:

- Understand self
- Understand others to create the best group result
- Build trust and relationships within a group setting

Other Purposes of the Session:

- Continue to develop the group as a performing community
- Understand how stories build trust in relationships
- Develop concept of learning styles
- See self as a facilitative leader

Questions to be Addressed:

- Why is it important to really listen to people in my group or community?
- How do stories help people express hopes, dreams, and fears?
- How do different learning styles affect community or group work?
- What does a performing community look like?

Before the Meeting (facilitation supplies and materials needed):

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Wall Charts from Previous Session

- The Best Test for Servant Leadership
- Steps to Performing Community
- Tool Box from first session
- Servant Leadership Wall

Premade Flip charts

Storytelling

- List one:
  - Adventure
  - Beach
  - Birthday
  - Girlfriend/boyfriend
  - Broken promise
  - Brother
  - Business
  - Camping
  - Car accident
  - Doctor visit
  - Puberty
  - Recital

- List Two:
  - First Kiss
  - Grandfather/mother
  - Flying
  - Haircut
  - Hiding place
  - Honeymoon
  - Lie
  - Locked out
  - Lost
  - Fall
  - Father
  - Shopping

Handouts

- Overview for Participants
- Participant Agenda
- Participant Handout #1 Listening Genuinely and Generously
- Participant Handout Set #2 How we learn—Learning/Thinking/Working Styles handouts should include:
  - Learning styles inventory Overview and Appropriate Use
  - Learning styles inventory
  - Scoring Grid
  - Learning styles inventory definitions
  - How We Take in Information
  - How We Use Information
  - The Whole Picture
  - The Egg

° The Stretching Egg
        ° Learning Styles Working with Others
    • Participant Handout #3 Telling your stories—Building Trust

Supplies

    • Hula hoops
    • Flip charts
    • Flip chart paper
    • Painter's tape (if flip chart paper is not self-sticking)
    • Non-permanent markers

Creating the Environment

Tools as in "New Tools for Leadership" would be an effective theme for this unit. Children's tools could be the playthings in the center of the table. There is also great border paper with tools available on-line or from a local office supply store that could be used for the agendas and special quotes.

Session Script

Session Overview

Welcome and Overview	15 minutes
Reconnecting/Transitioning from Unit One	45 minutes
Filling our Tool Box—Building Trust Relationships	45 miuntes
Break	**15 minutes**
So, How do YOU Function in a Group?	30 minutes
Learning/Thinking/Working Styles	60 minutes
Break	**15 minutes**
So, Where is Our Group Now? Steps to a Performing Community	30 minutes
Closing Circle	15 minutes
Total Time	**4 hours, 30 minutes**

As People Enter
15 Minutes

Materials: Flip charts, markers

Post two flip chart pages, with one question on each:

- What leadership qualities or skills do you use confidently?
- What leadership qualities or skills would you like to improve?

As people enter, ask them to record one or two answers on each sheet.

Welcome and Overview
15 Minutes

Materials: Overview, Participant Agenda

Welcome participants to the session on understanding self and others to create the best group result. Explain that in this session we are still gathering.

Introduce any guests, sponsors, or new participants. Explain the logistics of the day, including travel, meals, or other topics.

Take this time to review the day—concepts to be learned and the agenda:

Learning Objectives:
- Understand self
- Understand others to create the best group result
- Build trust and relationships within a group setting

Other Purposes of the Session:
- Continue to develop the group as a performing community
- Understand how stories build trust in relationships
- Develop concept of learning styles
- See self as a facilitative leader

Reconnect and Transition from Unit One
45 minutes

Materials: Flip chart, markers

WHY: This contributes to the important gathering stage. This is the time to collect the reflections and insights of the group.

HOW: Arrange the group in a circle or semi-circle. Ask the following questions of the group.

- What were you're ah-ha's—your thoughts—your insights as a result of our first session?
- What did you learn about the community from your homework?
- What did you see that you want to celebrate?

Record the thoughts on a flip chart. Since these questions were part of the homework, encourage everyone to share.

Filling our Tool Box— Telling Our Stories
45 minutes

Materials: Handout #1—Listening Genuinely and Generously, Handout #3—Telling your stories—Building Trust

Premade flip charts:
- List one:
  ○ Adventure
  ○ Beach
  ○ Birthday
  ○ Girlfriend/ boyfriend
  ○ Broken promise
  ○ Brother
  ○ Business
  ○ Camping
  ○ Car accident

- ° Doctor visit
- ° Puberty
- ° Recital
- List Two:
  - ° First kiss
  - ° Grandfather/mother
  - ° Flying
  - ° Haircut
  - ° Hiding place
  - ° Honeymoon
  - ° Lie
  - ° Locked out
  - ° Lost
  - ° Fall
  - ° Father
  - ° Shopping

Handouts–
#1, Listening Genuinely and Generously

#3, Building Trusting Relationships

WHY: Stories and storytelling are powerful ways in which to share one's thoughts, experiences, and beliefs. In today's society, we often rush past the stories of others and don't have the time (or don't take the time) for sharing and listening to the stories that have shaped our lives. This is unfortunate as stories and storytelling can help heal the soul, create new relationships and deepen current relationships. By building this type of social capital, individuals and groups can achieve their hopes and dreams. The following storytelling process can help people connect with one another. Distribute handouts #1, Listening Genuinely and Generously and #3, Building Trusting Relationships.

HOW:

1 Ask participants to gather in "pods" of three to four people so that they are sitting knee-to-knee (or close to knee-to-knee). Allow participants to be comfortable.

2 Present the participants the following two lists on flip charts (or modify these lists as you wish).

3 Ask participants to pick one word from the first list and take turns telling a three-minute story about themselves related to the word.

4 After the first round is completed, ask participants to pick one word from the second list and tell another three-minute story about themselves related to the word.

5 Debrief the discussion, asking participants about their insights from the experience. Remind participants that conversation, stories, and listening are all very important facilitative leadership capacities for their Leadership Tool Box.

Break	*(15 Minutes)*

So, How do YOU Function in a Group?
30 minutes

Materials: Hula hoops: hula hoops can be purchased at toy stores. Use 1 large hula hoop for 8-9 people; use 1 small hula hoop for 5-7 people

WHY: This is reinforcing our view of self and our view of others as we observe the way people function in a group when given a task. To build groups that work better we must be aware of our personal approach. This activity then serves as a natural introduction to learning styles, which are about how individuals function.

HOW:

1 Place the hula hoops on the floor approximately six feet apart.

2 Ask participants to form themselves in a circle around the hula hoops. Tell them how many people per hoop.

3 Give the following instructions: *"Stretch your arms out straight in front of you at shoulder height. Put your fingers in the 'quick draw' position with your pointer finger pointing across the circle. Now place the hula hoop on the end tip of everyone's pointer fingers."*

4 Instruct the group to lower the hoop to the floor without anyone removing his or her fingers. If any fingers come off the hula hoop, the group must start over. (This is much more difficult than it looks, but don't tell the group this.)

Observe the group and be ready to share some of the funny things you observe and hear. It will likely take your group between 15 to 30 minutes to complete this activity successfully.
    As each circle finishes, have them discuss how they functioned. When the whole group has completed the task, facilitate a group discussion.

- What did you learn about teams and working together?
- What did you learn about yourself?
- How did you function in the group, and did you really help the group accomplish the task?

Points that may come up (or that you may want to bring up) in the debriefing:

- In group work it is important to keep the goal (vision, mission) in mind if we want to be successful
- Often we blame others, the system, outside sources, even the equipment when we are having difficulty
- We often just jump into a task, forgetting to look at the skills of the team members or plan possible strategies
- The ideas of some people, especially quiet ones are often ignored, or are not even heard

Say: *Keep this discussion in mind and think about evaluating yourself and others as we move into the next topics.*

Learning/Thinking/ Working Styles
60 minutes

Materials: Participant Handout from Set #2—Overview of Appropriate Use

WHY: We all learn differently, learn in different ways according to different circumstances. To discover which methods suit different people best, David Kolb, Ph.D began developing the Learning Style Inventory in 1971. When you're working with other people the more you understand about the way they–and you, as leader–learn, the more successful the group will be. Distribute Overview of Appropriate Use handout.

HOW:

Handouts–
Learning Styles Inventory,
Learning Styles Inventory
Definitions

Wait for all participants to complete the inventory survey before continuing with the scoring process.

INVENTORY
Distribute inventory and definition handouts. Instruct participants to fill out the inventory not based on any specific "hat" they might wear (parent, student, community psychologist, teacher, nonprofit organization staff person, etc.). Instead, answer these questions <u>thinking about a recent time when they learned something new.</u>

Say: *Compare each row of four words and score them using the 4-point scale with: 4 being the word that MOST describes you and 1 being the word that LEAST describes you. Feel free to look at the definitions list–some of the words used can have multiple meanings. Do not calculate any totals yet because we have one more step to do after everyone is finished.*

TOTAL PARTICIPANT SCORES
Say: *Now that everyone is finished, our next step before totaling the scores is to cross out a few words. Starting with the first column, I'll tell you which words to cross out. These will be the scores you leave out of your totals:*

- *First Column on the left, cross out: discriminating, abstract, intense*
- *Next Column, cross out: relevant, risk-taker, productive*
- *Third Column, cross out: involved, concrete, future-oriented*
- *Last Column, cross out: impartial, aware, questioning*

Now, with the words remaining in each column, total the numbers and write the total in the blank at the bottom of the sheet.

Handout—Scoring Grid

PLOT SCORES ON DIAGRAM
(Handout Scoring Grid)

Let's plot the points first, taking the column total scores from the inventory you just finished:
- *Plot your first column CE score on the north axis*

     • *Plot your second column RO score on the east axis*
     • *Plot your third column AC score on the south axis*
     • *Plot your fourth column AE score on the west axis*

DISCUSSION: HOW WE TAKE IN INFORMATION

Let's discuss how we take in information. Describe the two halves using the slide/flip chart to guide you.

Handout—How We Take in Information

Take a look at your shape.
     • *If yours is more on the top half of the egg, you are a concrete learner. Is that accurate in real life?*
     • *What about those whose shape is more on the bottom–Is it true that you prefer to learn through books and theories and more abstract information?*

Can anyone think of a situation where you were working with someone who was the opposite of your natural strength? Tell us what happened.
     • *How did it feel as it was happening?*
     • *Did negative blaming occur?*

As you can see from the slide/flip chart, the majority of the population (85%) prefers concrete learning to abstract learning. How many here scored more abstract than concrete? (Observe whether this group is similar or different than the general population. If different, ask, "What is it about this group that might explain this?")

DISCUSSION: HOW WE USE INFORMATION

Handout—How We Use Information

Describe the two halves using the handout to guide you.
Take a look at your shape.
     • *If yours is more on the left half of the egg, you are more action-oriented than reflective. Is that accurate in real life? Have you ever been accused of running people over with your decisions and actions or of being impatient?*
     • *What about those whose shape is more on the right half of the egg–Is it true that you prefer to reflect before taking action? Have you ever been accused of taking too much time to make a decision?*

Can anyone think of a situation where you were working with someone who was the opposite of your natural strength? Tell us what happened.
     • *How did it feel as it was happening?*
     • *Did negative blaming occur?*

As you can see from the handout, the majority of the population (80-85%) is more action-oriented than reflective. Is it any wonder that our society rewards action? How many here scored more reflective than active? (Observe whether this group is similar or different from the general population. If different, ask, "What is it about this group that might explain this?")

One of the key takeaways from this is the importance of attending to different learning styles. The majority of people are action-oriented, but a number of us need to reflect before we are comfortable taking action.

DISCUSSION: THE WHOLE PICTURE

Handout—The Whole Picture

Avoid revealing more about each quadrant. After participants take part in the following exercise, they will better understand the significance of the quadrant characteristics.

Explain the whole picture using the handout to guide you. Terms such as "top-left, bottom-right" aren't as value-laden and don't trigger judgments as much as other words that are more labeling. The majority of the population (70%) is top-left (10% bottom-left, 10-15% top-right, 3-5% bottom-right).
- How does this group compare?
- How many were surprised by your results?

We have to remember that most of us are in situations every day that require us to stretch, and even though it may not be our natural strength, we can become very skilled at working outside our box or comfort zone.

PLAN A PARTY EXERCISE
Materials: Flip chart, markers

Have people divide up based on their primary quadrant. Looking at the number of people in each group, ask, "How does this compare to Kolb's statistics?"
Give them 5-7 minutes to plan a party. (Do not give participants too much planning time. Doing so will give them time to work outside their natural strengths and their party plans will be less effective in illustrating quadrant characteristics.)

Each group should consider these questions and record their answers:
- Who will you invite?
- How will people be invited?
- How will your group work together to plan the party?
- What will happen at the party?
- Other ideas from the perspective of your quadrant…

Call them back as a whole group to share their progress.
- What was the conversation like?
- Was it easy to plan?
- Tell us about your party! Allow each group to share while you (the facilitator) look for things that emphasize that quadrant's characteristics.
- Anyone else from that SAME quadrant want to add anything?
- Anyone else from a DIFFERENT quadrant want to add anything?

Proceed through each quadrant's report.

DEBRIEF THE GROUP PROCESS
- What happened in your group as you were trying to plan the party? (Tie to quadrant characteristics.)
- Did anyone notice any major differences between the reports of each quadrant? Compare top vs. bottom quadrants and left vs. right quadrants.
- How would this activity have been different if each group had included people from each quadrant?
- What did we learn?

Handout—The Egg

IDENTIFY QUADRANT CHARACTERISTICS
Let's look more closely at the characteristics of each quadrant.
(Hand out The Egg and explain.)

Handout—The Stretching Egg

Compare to what happened in the "Party reports."
(Hand out The Stretching Egg and explain.)

Say: *Unfortunately, not every situation has people with natural strengths in all four quadrants. If we don't stretch beyond our natural strengths, many things we do as groups would not be as successful as they could be.*

Earlier we shared stories about working with people who are the opposite of our natural strengths. Let's revisit some of those stories. What worked well? What didn't work so well that the insights of Learning Styles might help us understand? How do we use our differences to work more effectively as a team?

As we said before, the value of Learning Styles is how it helps us think about how we can work together most effectively.

Handout—Working with Others

(Hand out Learning Styles—Working with Others and discuss.)

FINAL: "TRUTH IN ADVERTISING"
Limitations of Learning Styles:
- Test may not be accurate if you take too much time to answer
- Some words are not commonly understood
- Controversy–Does your learning style change?
- Should not be used as box or a crutch

TEACHING LEARNING STYLES
Say: *We hope this presentation will continue to benefit you and those with whom you have contact. Please take this material and use it with others. Any ideas about how you could share Learning Styles with others in other settings in your life? Any final questions about Learning Styles?*

Break	*(15 Minutes)*

So, Where is our group now? Steps to a Performing Community
30 minutes

WHY: To connect our work today with Steps to a Performing Community, the framework for all of the sessions.

HOW:

Refer to the Steps to a Performing Community chart. Remind the group of what happened during both sessions in Gathering. Explain that every time a group comes together it must spend some time in the Gathering Stage and we will do that in this program. Emphasize the importance of gathering and discuss what happens when this stage is skipped.

Today we began moving from Gathering to Chaos. Referring to the Steps to a Performing Community, remind participants of the Chaos stage. Clarify that this stage may be difficult but it is also a time to learn, develop relationships, and form as a team. Talk about the role of Chaos in the life of a group, and how the facilitative leadership capacities learned in this session (stories, listening, learning styles) help groups move through Chaos.

Chaos has an important purpose in the life of a group. This is a time when you can uncover issues in the group, discover talents of people, generate creative ideas. To move a group through Chaos it is important to help individuals find their purpose and role in the group (learning styles does this); and to help people find they have some connection and commonality with others in the group (stories and listening). These activities help build a sense of trust and respect. These two things are vital if a group is to move through Chaos to Performing.

Leadership Tool Box chart

Refer to the Leadership Tool Box chart on the wall. Add what they have learned in the first two sessions to move through chaos: story-telling, learning styles, genuine listening, individual roles, etc.

Closing Circle
15 minutes

Remind the group that servant or collaborative leadership is at the heart of facilitative leadership. Review the description of servant leadership and discuss how learning styles can help them function as a facilitative leader. Because Learning Styles shows people their natural talents, a servant leader will focus on those strengths and help the person develop those strengths even more. Remind them that we will continue to focus on servant leaders during each session.

Ask the group to share the new things they learned about other participants through the sharing of their stories. Ask them to connect with other members in the coming weeks through listening to their stories.

So what are you going to do as a result of what you learned during this session?

REVIEW/ASSIGN HOMEWORK:

1 Do learning styles inventory with a group in your office team, a church group, or your family. If you need help invite someone from this class to help you.

2 Think about your learning style. Be aware of how you function in all of the groups you are in. How will this knowledge help you with a problem individual or group? Notice one thing about your style before next time.

3 Observe leadership in the community. Where do you see collaborative servant leadership?

4 During the next session we will create a vision for our community. Ask yourself, "If we get it right, what will our community be like?"

5 Continue observing servant leaders.

Listening Genuinely and Generously

- Listen with the intent to understand, not with the intent to reply.

- Listen with a focus on the other person's strengths not problems.

- Refrain from fixing the other people or their issues!

- Acknowledge what the other person says before responding.

- Suspend your own agenda and preconceived notions and expectations.

- Refrain from jumping in.

- Be absorbed in their story!

- Ask for clarification. Invite them to say more.

- Don't overreact–replace reaction with intentionally listening harder.

- Pay attention! Appreciate! Affirm!

"Listening to understand not just to prepare a reply builds relationships. It is a skill that is a natural outgrowth of an attitude of caring and concern for other people."

—MICHAEL NICHOLS,
   The Lost Art of Listening

"We strengthen life any time that we listen generously or encourage someone to find meaning, or wonder about possibility, or dream or hope or escape from self-judgment and inner-criticism, or know they matter. Any time we share someone's joy we bless the life in them."
   –RACHEL REMEN, M.D., *My Grandfather's Blessing*

Learning Styles Inventory Overview of Appropriate Use

The Learning Styles Inventory was developed by David Kolb over the last 30 years and is designed to assess how individuals receive and interpret information, especially how they learn through experience.

The roots of his work reflect the thinking of Piaget's developmental theories, John Dewey's experiential learning constructs, Kurt Lewin's work around the tension of analytical/abstract thinking and concrete experience, and Carl Jung's preferred and nonpreferred ways that people receive and interpret information and experience.

The purpose of the Learning Styles Inventory is to assess individual ways of learning from experience.

Kolb's Learning Styles Inventory has been used extensively, and there is impressive research literature on the validity, reliability, and usefulness of the scale.

To summarize that literature, early forms of the Inventory were characterized as having some difficulties in scale reliability and validity, but the most recent version has addressed many of those concerns. Recent independent research by Veres, Sims, and Locklear found that all four learning quadrants showed good internal consistency, and test-retest reliability greatly increased with the randomized scoring format of the most recent form. Of the large number of validity studies, 83.3% showed support for the construct of learning styles and the inventory.

The more important issue surrounding the Learning Styles Inventory is how it is used. To summarize, Kolb's Learning Styles Inventory was found to be useful and appropriate for:

- gaining appreciation for diversity
- identifying different approaches for different individuals and different ways to receive and interpret information and experience
- promoting an atmosphere of greater appreciation for differences among learners
- gaining insight into one's own way of learning through experience
- gaining insight into others' ways of learning through experience
- helping groups better understand collaboration and using strengths of participants

There have also been a number of studies and summaries that show when the Kolb Learning Styles Inventory is not useful or appropriate:

- predicting particular behaviors or predicting performance
- categorizing individuals, as we are all able to operate in many learning ways
- using the inventory for selection criteria for jobs, special classes, etc.
- using the inventory as a personality assessment, particularly abnormal personality, as Kolb's scale does not replace such instruments as the California Personality Inventory, the 16PF (personality factors), the MMPI, or even the Myers-Briggs

In general, research findings support the original intention of Kolb, which is that the Learning Styles Inventory is useful for description but not prediction or categorization.

Learning / Thinking / Working Styles Inventory

This inventory is designed to assess your natural strengths/style in learning, thinking, and working. There are no right or wrong answers. All characteristics are equally valuable. The goal of this inventory is to describe your natural strengths, not evaluate them.

STEP 1: Below are nine sets of words in rows (labeled A through I). Rank order each set of four words using the numbers 4, 3, 2, and 1 as the following scale indicates with 4 being most like you and 1 being least like you:

Column 1	Column 2	Column 3	Column 4
A. ___discriminating	___tentative	___involved	___practical
B. ___receptive	___relevant	___analytical	___impartial
C. ___feeling	___watching	___thinking	___doing
D. ___accepting	___risk-taker	___evaluative	___aware
E. ___intuitive	___productive	___logical	___questioning
F. ___abstract	___observing	___concrete	___active
G. ___pressure-oriented	___reflecting	___future-oriented	___pragmatic
H. ___experience	___observing	___conceptualization	___experimentation
I. ___intense	___reserved	___rational	___responsible

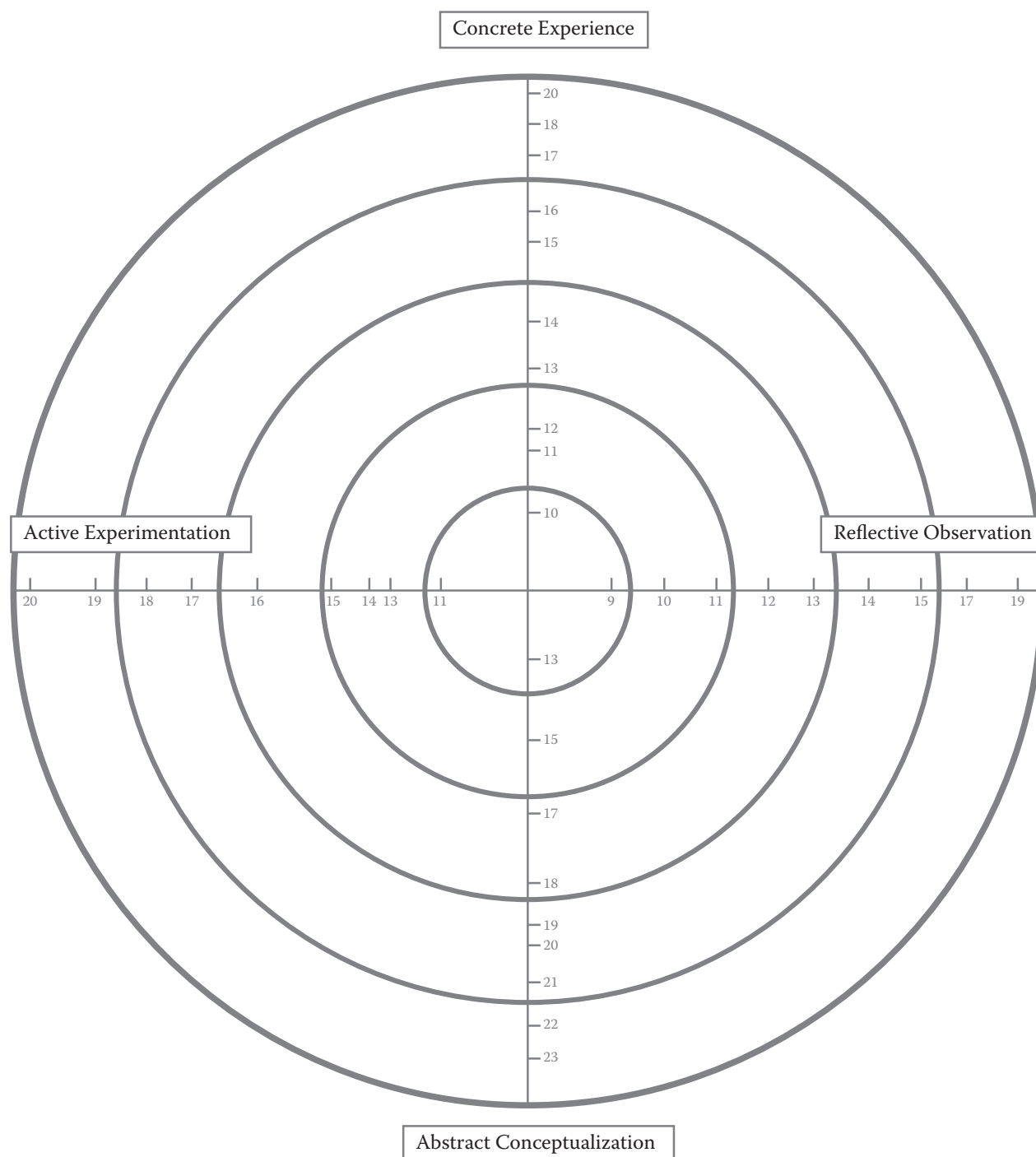STEP 2: Record the values for the following columns.

Column 1	Column 2	Column 3	Column 4
__+__+__+__+__+__	__+__+__+__+__+__	__+__+__+__+__+__	__+__+__+__+__+__
B C D E G H	A C F G H I	B C D E H I	A C F G H I

STEP 3: Add the above values and record the sum in the spaces below.

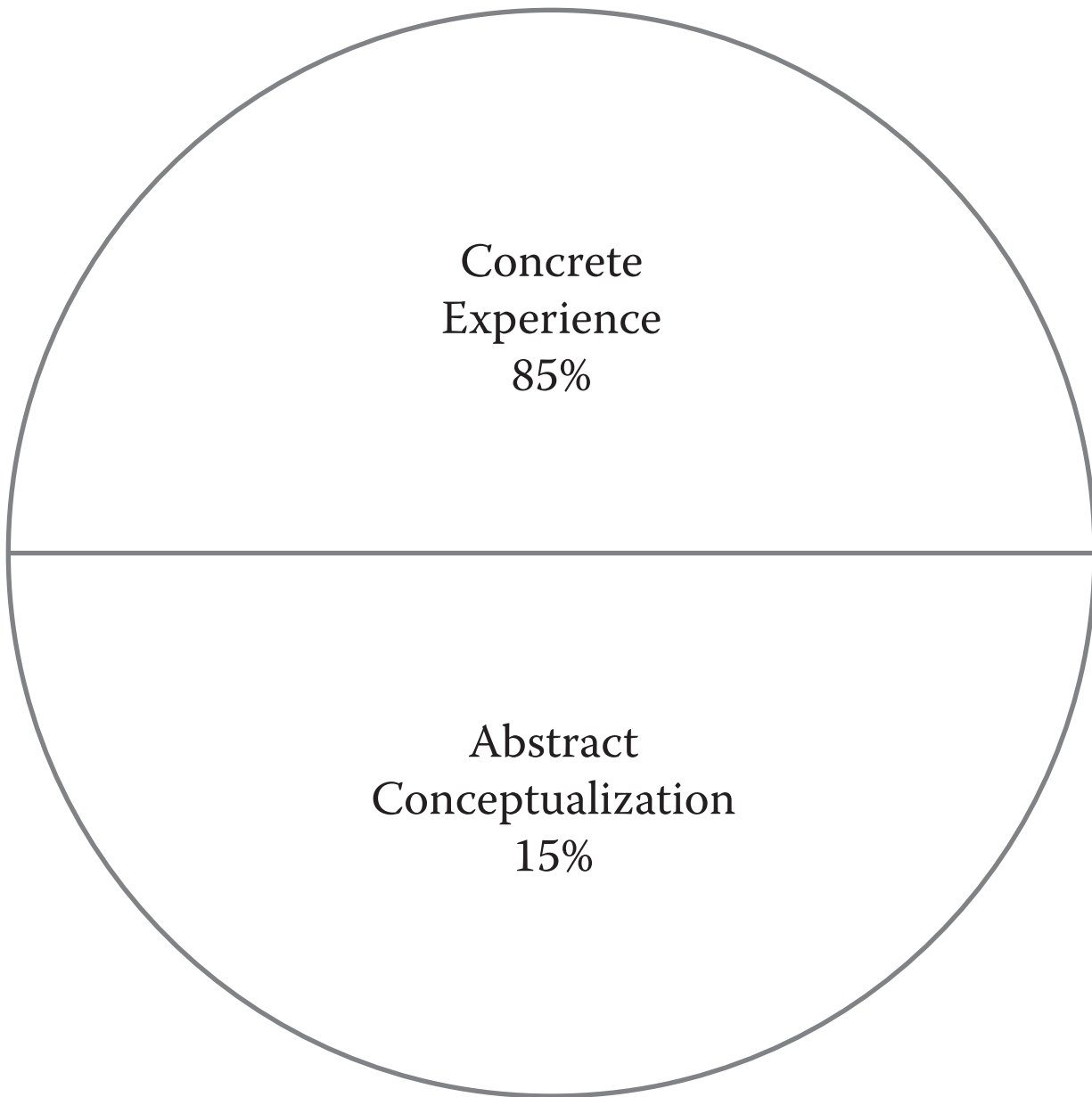| Column 1	Column 2	Column 3	Column 4
_____	_____	_____	_____
CE	RO	AC	AE

Scoring Grid

After totaling the ranks for each of the four columns on the inventory survey as instructed, transfer the four raw scores to the diagram below by placing a mark next to the number you scored on each of the four dimensions. Connect these four marks with straight lines. Depending on the placement of your marks, you will see either a three-sided or a four-sided figure.
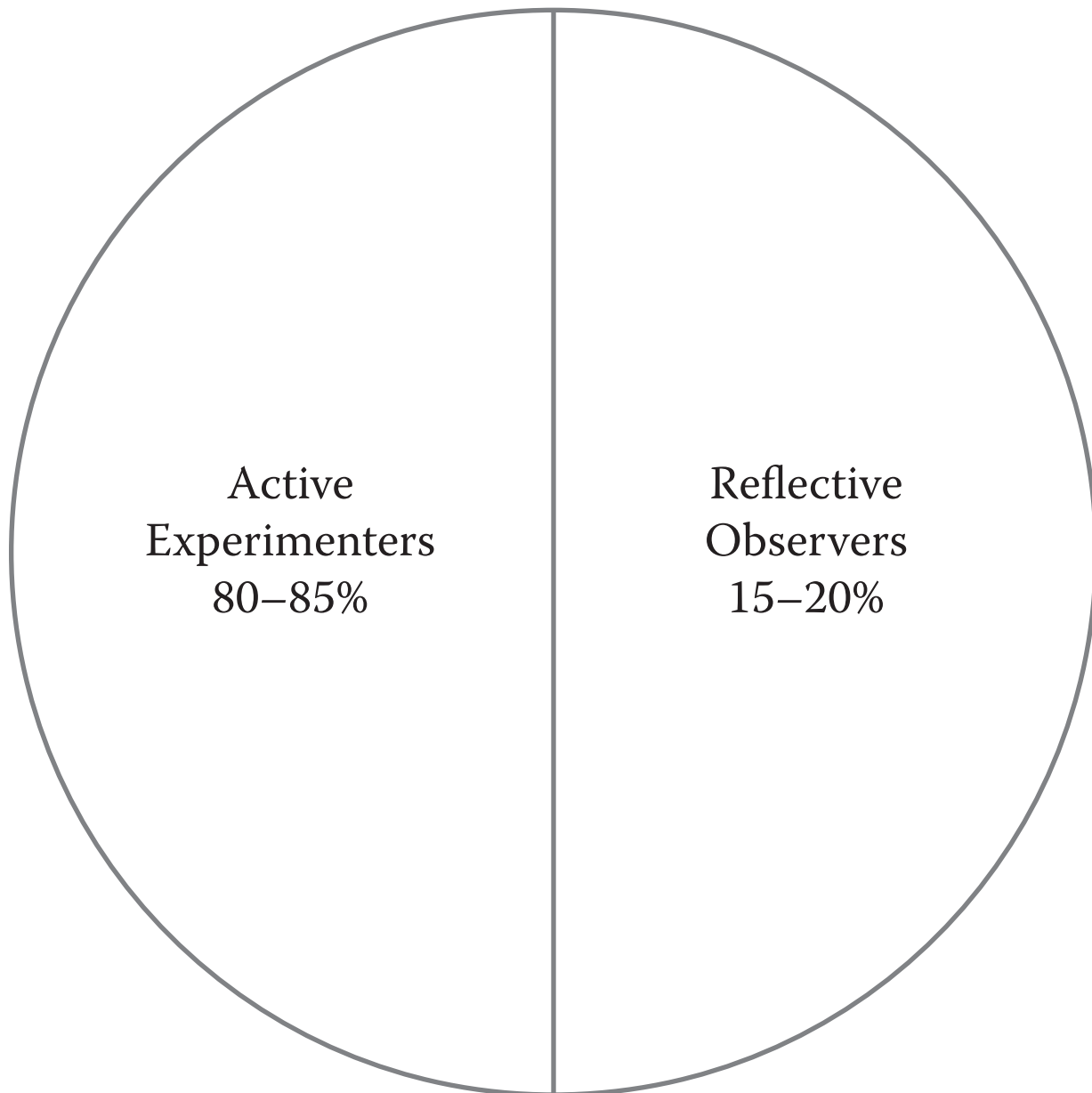
Concrete Experience

20
18
17
16
15
14
13
12
11
10

Active Experimentation

20 19 18 17 16 15 14 13 11 9 10 11 12 13 14 15 17 19

Reflective Observation

13
15
17
18
19
20
21
22
23

Abstract Conceptualization

Learning Styles Inventory Definitions

A. Discriminating—to show a difference; capable of recognizing fine distinctions
Tentative—hesitating; uncertain; cautious
Involved—including; having an effect on; complex; willing to participate
Practical—having good sense; motivated by action rather than ideals

B. Receptive—able, quick, or ready to receive ideas; open to new ideas or concepts
Relevant—concerning or connected with the matter at hand
Analytical—concerned with or capable of reasoning processes
Impartial—without bias

C. Feeling—capacity for or ability to react with emotion
Watching—able to observe attentively; look carefully
Thinking—able to reason or ponder
Doing—to perform; produce effort; to act

D. Accepting—to regard as true; to receive gladly; to understand or construe
Risk-taker—to take a chance; to venture out
Evaluative—to examine carefully; capable of estimating the importance or significance
Aware—alert; having knowledge; realizing

E. Intuitive—possessing sharp insight; perceiving or understanding immediately without reasoning
Productive—constructive in actions; producing much
Logical—reasonable; ability to reason clearly
Questioning—inquisitive; examining or expressing doubt

F. Abstract—Concerned with ideas or concepts rather than actual particulars or instances
Observing—watchful; to take notice
Concrete—existing as an actual object, not merely as an idea or as a quality
Active—working hard; busy; energetic

G. Pressure-Oriented—focused on an urgent matter; geared toward a compelling influence
Reflecting—to think or consider carefully or seriously
Future-Oriented—focused on what is to come or a time yet to come
Pragmatic—concerned with the practical results or values; concerned with causes/effects—not theories

H. Experience—what happens to a person; what is seen, felt, done, or lived through; accumulation of knowl-edge/skill
Observation—the act, power, or habit of seeing and noting; watching or being watched
Conceptualization—the process of forming an idea or general understanding
Experimentation—trying something new; conducting a test; trying to find out something

I. Intense—deeply felt; strenuous exertion; full of vigorous activity or strong feelings
Reserved—set apart or held back; having or showing self-restraint
Rational—able to think or reason clearly
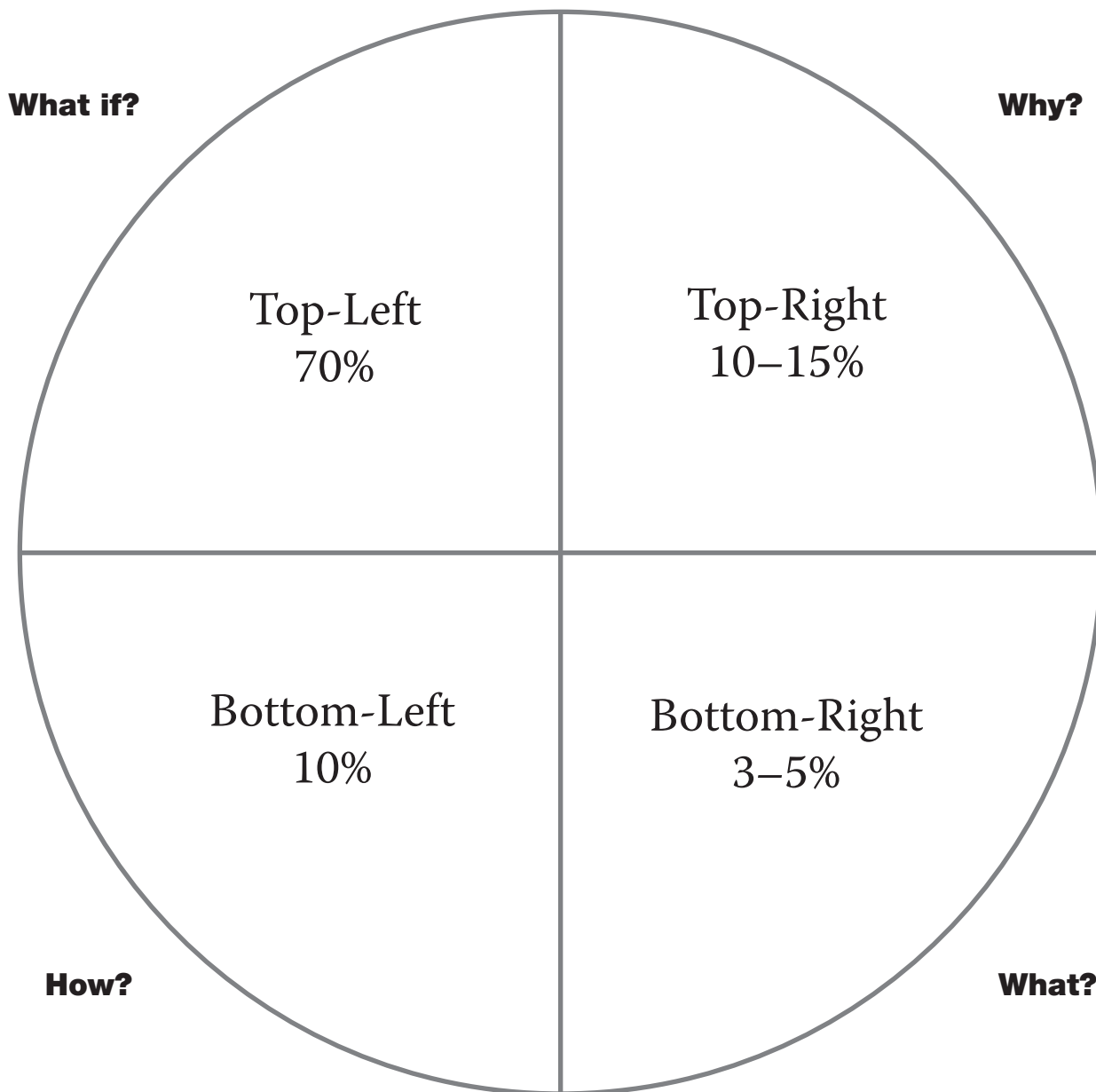Responsible—trustworthy; reliable; displaying good judgment, sound thinking

Concrete
Experience
85%

Abstract
Conceptualization
15%

Active
Experimenters
80–85%

Reflective
Observers
15–20%

The Whole Picture

The Quadrants and the percentage of the population that fall into them.

What if?

Why?

Top-Left
70%

Top-Right
10–15%

Bottom-Left
10%

Bottom-Right
3–5%

How?

What?

The Egg—A Description of Working, Thinking, Learning Styles

Concrete Experience

What if?

Active Problem Solving

CRISIS

Intuitive

ADAPTABLE

Entrepreneurial

Risk Taker

Enthusiastic!!!

Leads by Energizing People
-Holds Up Vision

Learns by trial and error
LOVES THE BIG PICTURE

Why?

SYMPATHETIC
Brings Harmony

LEADS BY TRUST AND PARTICIPATION

Observes Others

SEEKS PERSONAL MEANING

Sensitive

Reflective

Helpful

Directed by Feelings and Emotions

Tackles problems by first reflecting alone, then brainstorming

Active Experimentation

Leads by personal forcefulness

Values   Practical
Strategic   Literal
Thinking   Precise

Seeks analytical solutions to problems

Thrives on plans and timelines

PRODUCTIVE STEADY

Limited tolerance for fuzzy ideas

Reflective Observation

Firm   Learns by thinking through ideas
Minded

Makes decisions impersonally

LEADS BY PRINCIPLES AND PROCEDURES

Planner

Uncomfortable with subjective judgments

Driven by intellect—
"What do the experts say?"

Likes Details

Analytical

How does this work?

What?

Abstract Conceptualization

"The Stretching Egg" - Balancing Our Act

Think through the details

Finish Something

If you live in this quadrant, your "work-out" must include. . .

If you live In this quadrant, your "work-out" must include

Slow Down When Sharing Ideas.

Organize

Seek Facts

Value strategic thinking

Listen without fixing

RESPECT DETAILS

REFLECT

Appreciate Procedures

Make

BE PRACTICAL!

Try Something-New!!

Organize ◆ Structure

Think through how something works

Plan Ahead

Deal with conflict

Respect the Process

Take time to know people

CREATE!!

Brainstorm Ideas

Reflect ◆ Listen

Be Sympathetic
Develop Trust

WELCOME CHANGE!

Think of people

Motivate others

Become comfortable with chaos

RISK

Deal With Conflict

Try it before it is perfect

Share Feelings

If you live in this quadrant, your "work-out" must include:

If you live in this quadrant, your "work-out" must include:

Connect with people

Do Something

Working with Others

Top-Left (70%)

Find Satisfying:

- A flexible agenda
- Participants looking beyond stated objectives
- Strong, spirited interactions and energy
- Actions based on intuition
- Open discussion and interaction

Find Painful:

- Rigid adherence to an agenda and/or timetable
- Tentative, cautious people
- Long monologues
- Pretense at discussions when decisions have already been made

Top-Right (10–15%)

Find Satisfying:

- Making connections
- Honesty
- Interests are elicited
- Time is allowed for discussion about feelings
- Leader/group provides for consensus building

Find Painful:

- Leader is insensitive to feelings
- Lack of trust among the group
- Unresolved conflicts
- Not giving consideration to those affected by the group's decision
- Meetings that have no personal relevance

Bottom-Left (10%)

Find Satisfying:

- A productive, problem-solving environment
- Exercising common sense
- Using ideas
- Decisions congruent with values
- Achieving closure

Find Painful:

- Lack of focus, leading to side issues
- Venting of emotions
- Dealing with personalities, not issues
- Inattention to practical realities
- Leader does not move to closure

Bottom-Right (3–5%)

Find Satisfying:

- Clearly defined issues, tasks, or problems
- Information is based on facts
- Adequate notice and time for prep
- Pros and cons are weighed
- The group stays on task
- An objective perspective, a solid structure

Find Painful:

- No agenda
- Leader does not understand the total picture
- No time for preparation
- Insufficient time spent defining the problem
- Lack of clarity as a meeting progresses
- Insufficient information for problem solving or decision making

Building Trusting Relationships

Storytelling is an important capacity for the twenty-first century leader. It builds trust and unity, teaches shared life experiences, and empowers others. Without stories, life becomes, as Richard Stone in *The Healing Art of Storytelling*, says: "a book cover without the pages–nice to look at, but not very fulfilling." Margaret Wheatley reminds us: "We cannot hate a person whose story we know." Stories communicate ideas and information as no other medium can.

"To be a person is to have a story to tell."

-Isak Dinessen

Storytelling Reminders

- Everyone has a story.

- Stories connect with the heart, mind, and soul of the listener.

- Stories have an incredible way of connecting people. Telling and listening to stories creates empathy and helps people find the things they have in common.

- Effective groups must begin with trust. Without trust we are reluctant to share our ideas, our thoughts, ourselves. Storytelling is key to building trust in a group.

- Through storytelling we can come to know who we are in new and unforeseen ways.

- Telling the "who am I" stories helps build relationships. These stories help us understand who people are and why they are that way.

- Tell real stories. Stories are happening around you constantly.

- We learn lessons and share experiences by merely hearing others' stories.

- Organizational or community stories create collaborative action by bringing unity despite differences.

- A story requires a good intentional listener. When we listen in this special way we find meaning and joy in the story and apply it to our lives.

"The immeasurable strong gravitational field that holds a group together is their stories–common and simply ones that they share with one another. These stories are about people, events, triumphs, and tragedies. They transcend time and place."
—Terrance Deal and Lee Bolman, *Leading with Soul*

Unit Two Extras and Additional Materials

If you want more context ...

Focused discussion of Learning, Thinking, Working Styles

- Divide the group up into smaller groups based on each individual's dominant learning style quadrant. Ask each group to assign a recorder to use the flip chart in taking notes and a reporter who will share with the large group when all come back together. The questions to discuss are:
  - What is it like to live in this quadrant?
  - What is satisfying or frustrating?
  - What do we need from other quadrants in order to be productive?
  - How do we contribute to teamwork?
- After about 10 minutes, bring the group back together to report.
- Ask the class members how they will incorporate what they learned about their own quadrants? About other quadrants?

Suggested time: 20 minutes

Lecturette: Setting up the Learning

Consider saying something like this between the Reconnecting Discussion and the Storytelling Exercise:

The current research on groups shows very clearly that if we want groups to work, we must intentionally build trust and positive relationships within the group. How do we do this? No matter the size of the group, people can help build trusting, respectful relationships by:

- *Thinking about their own attitude and perspective (servant leadership)*
- *Knowing how they personally communicate and function*
- *Allowing people to get to know one another*
- *Helping a group discover their shared history and common values*
- *Having the group articulate a unifying vision*

Every person has a story to tell about how these ideas work or do not work in real-life situations. The good news is that common sense and the facilitative leadership capacities of relationship-building, listening, storytelling, and learning styles allow these things to happen. These capacities used

intentionally and purposefully help move groups to a point where the people within the group feel confident and competent, trust is being built, and effective work is occurring.

A person does not have to wait until he/she is the CEO or the one with the gavel to accomplish this. It can be done by using the capacities discussed in Unit One.

Today is a good opportunity for relationship-building and sharing among the group. You will have the opportunity to focus on using the four capacities of relationship-building, listening, storytelling, and learning styles.

We caution you that confidentiality is important throughout our class experience and especially in today's session.

Suggested time: 5 minutes

Lecturette: Using Stories to Build Trust

Consider saying something like this before or after the Storytelling Exercise, particularly if your class does not intuitively see the connection between storytelling and leadership:

Storytelling is an important capacity for the facilitative leader. Annette Simmons, in her book, The Story Factor, *asks what impact do you want to have on the world? She then contends that "storytelling is a powerful tool for social, political, and personal activism." Today you will use storytelling, stories, and getting people to tell their own stories interchangeably. These words do not mean an entertainer who is relating stories but rather people sharing their own personal experiences through stories.*

Stories communicate ideas and information as no other medium can. Doug Stevenson, in his workshops on storytelling says: "Stories connect with the heart, mind, and soul of the listener and appeal to all learning styles." Storytelling serves many purposes. It is a key to building trust in a group. "We cannot hate a person whose story we know," Margaret Wheatley reminds us. Simmons reinforces this when she writes: "The telling and hearing of stories is a bonding ritual that breaks through an illusion of separation. When we share organizational or community stories it helps us discover the power of story to unify despite differences."

Stories create trust. We have all seen the lack of trust that abounds in many groups. Taking the time to build connections among people by getting them to tell their story is an important step in building trust. Robert Putnam and Lewis Feldstein in Better Together *found that "telling and listening to stories created empathy, helped people find the things they had in common." When bringing diverse groups together, they found storytelling built the social capital necessary to get work done. Stories uncovered unifying themes and commonalities which then provided the reasons for people with different perspectives to work together.*

Getting people to tell their stories requires genuine listeners, good questions, and a time and place to relax and enjoy. Ask questions that push people to reveal their personal feelings, but make sure you respect their privacy and sensitivity about certain things. As people share meaningful stories, most often listeners want to know more about the other person. We will find reasons to sit next to them, to share similar experiences, and to see if perhaps we have even more things in common. This leads to connections and trust.

Suggested time: 5 minutes

Lecturette: Summarizing the Learning

Consider saying something like this between the Steps to a Performing Community Discussion and the Closing Circle:

Today is an opportunity to look "from the balcony" on how the whole community operates and begin to apply the concepts of facilitative leadership to our own way of working.

Unit Two takes the concepts of effective Twenty-first century communities and facilitative leadership presented in Unit One and brings them home—home to the groups where we live, play, worship, serve, and work. Malcolm Gladwell in The Tipping Point *says that change happens because we intentionally act differently in the places where we have influence. He believes that an individual's behavior can be altered by a new idea only if the person applies the idea to his/her real situation. We are looking together to see how we can apply facilitative leadership to every aspect of our lives.*

We are moving the understanding of the steps of a performing community to a deeper, personal level through connecting to your personal situations and experiences. We may realize our behavior has an impact on the groups we are in but not always understand how we can change that behavior for the good of the group. The facilitative leadership capacities introduced in Unit Two provide practical tools to use in all of the groups in which we function. As Gladwell states, for people to see themselves as facilitative community leaders they need the tools with which they can begin to make a difference in their personal spheres of influence.

Our work today may well call to mind groups that are quite literally in chaos. These groups are characterized by protecting turf, confrontations only on e-mail, heated discussions after meetings in the parking lot, polarization, a lack of trust and positive relationships, or people dropping out of the group. Knowing how to help these groups is why building relationships and trust is a critical learning objective.

Suggested time: 5 minutes

If you want to increase knowledge of/interaction with the community ...

Local History / Storytelling

Invite members of local storytelling groups or historical re-enactors to perform for the class. Ask the performers what storytelling means to them, how they started doing it and examples of the impact they have seen on audiences.

Ask questions such as:
- Who are naturally (or practiced) great storytellers you know? What impact do they have?
- Where are some "non-traditional" settings in which storytelling could be an act of leadership?
- Who are people in your community whose stories are not told–or not remembered? How might you gather and keep those stories?
- How has technology affected storytelling?

Suggested time: 45 minutes

Business and Government Applications

Discuss the role of storytelling in influencing policy. How do powerful stories get people involved in issues? How can they influence change? How can you use stories in structured meetings, such as city council?

Suggested time: 15 minutes

Discuss learning styles as related to customer service. How could knowing about learning styles help your staff better understand and serve your clients, customers or constituents? What strategies could you use to help them learn?

Suggested time: 15 minutes

Think about times when having someone of another learning style on your decision-making team improved the process. Did it speed up or slow down the process? What strategies could you use to be sure that perspective is represented in the future?

Suggested time: 15 minutes

If you want to practice a related capacity ...

Servant Leadership

If you are using the Servant Leadership wall, then as people enter in the morning, ask them to record the name of the servant leader they observed on it.

Suggested time: 5 minutes as an addition to "As They Enter," or may substitute this altogether

Lecturette: Applying Learning Styles to Conflict Management

After practicing Learning/Thinking/Working Styles, consider saying something like this:
No one quadrant is better than another; each is different and brings strengths to the group. Knowing our learning style does not give us an excuse to behave in a certain way. But knowing this informa-tion will allow us to use our gifts and talents and also allow us to stretch into the other quadrants. It is important to share this challenge with participants as you teach learning styles.
When a group is in trouble, the first thing to check is learning styles. Is there frustration about these differences? If so, by sharing learning styles we can turn those frustrations into a celebration of strengths.
When a group is not working well, always begin with learning styles. You need to know your learning style and the learning styles of those you work with. How is your learning style affecting the way you see the situation as opposed to how others see it? Remember that those with opposite learn-ing styles will have the most difficulty understanding each other. However, the most important thing

to remember is that a group needs all learning styles to work most effectively. As educator Howard Gardner stated: "It is of the utmost importance that we recognize and nurture all of the varied human intelligences and all of the combinations of intelligence."

Ask the class members to individually or in pairs reflect on a situation in which a group they were in experienced conflict or disagreement. How might learning styles have played a role in the conflict? How might learning styles have played a role in how the conflict was managed? Knowing about learning styles, what can you do in the future to anticipate and manage conflict?

Suggested time: 15 minutes

If you want an energetic activity ...

Using the Learning, Thinking, Working Styles Concept Without Completing the Inventory and Plotting Chart

Option 1

Demonstrate how this inventory can be used without the assessment by using a premade flip chart and explaining the following:

- How we take in information—top (concrete experience) vs. bottom (abstract conceptualization)
- How we use information—left (active experimentation) vs. right (reflective observation)
- By quadrant—how we relate to others/the world–refer to descriptors in each quadrant of The Egg and percentages of people falling into each quadrant (Refer to Handout Set 2–The Whole Picture)
- Self-identify in which quadrant you would primarily land
- Show them how to review what is painful / what is satisfying
- Show them how to review The Stretching Egg

Suggested time: 15 minutes

Option 2 (Especially useful when working with youth)

- Use tape to chart a large egg with quadrants on the floor of the room.
- Have participants stand on the center "east to west" line.
- Describe the ways people take in information and ask participants to move "north or south" based what they tend to do or feel comfortable with.
- Now, describe the way people use information and ask participants to move "east or west" (while holding their "north or south" position).
- Now review the egg with them and see if they agree that they are in the right location.

Suggested time: 10 minutes

Option 3 (Also useful with youth and can be used in combination with Option 2)

Have participants stand outside the egg (if the egg is taped on floor). Or use an egg drawn on a flip-chart. Ask people to raise their hands or move to the quadrant based on the following story:

- You just received some money from your aunt. It is enough to buy a video game of your choice (or other item of value based on the age group).
- How would you go about purchasing the item? (Ask participants to stand in the quadrant of choice or mark their initials in the quadrant as they indicate their choice.)
  ◦ Talk to all my friends, find out what video game they don't have yet or one that they want so we can all spend time together playing and sharing the game. (Upper Right)
  ◦ Spend time by myself on the Internet or reading video game magazines and determine the best game for the amount of money available and the best place to purchase the item. (Lower Right)
  ◦ Get some friends together and go shopping, play some games, have some fun–pick a game. If these people don't agree on a game, have a lively discussion. It's about having fun, people! (Upper Left)
  ◦ Gather some information about video games while shopping around with someone who really knows a lot about video games (at least as much as you do but hopefully even more). We would decide where we would shop in advance and what basic features we were looking for. (Lower Left)

Review The Egg and check to see if their choice fits.

Suggested time: 15 minutes

If you want to ask more questions ...

Questions to use in debrief sessions, opening or closing circle
- Where else could you use learning, thinking, working styles to better understand groups?
- If you have taken other inventories, such as Meyers-Briggs or True Colors, how did the process compare? How did the results compare?
- What surprised you about your or others' results in the learning styles inventory?
- What other topic starters could be added to the storytelling list?
- Where have you effectively seen storytelling build trust between people?
- How do stories help people express hopes, dreams and fears?

If you want to connect the topic to the class project(s) ...

Using Steps to a Performing Community to Influence Project Selection

- Leave up (or recreate) the wall of sticky notes from Unit one that document community assets. Explain that this document is our view of the community. Looking at Steps to a Performing Community, talk about gathering as determining what we have to offer.

- Ask participants to then add sticky notes representing the ways they contribute to the community (categories could be skills I share with the community, positions I hold or have held in the community, service or volunteer contributions I make) and a category for what they would like to do or contribute in the future.
- For programs that will have a class project as part of the program, this information can inform what class project(s) they choose to work on. Build the discussion to the question: "What's a class project we could work on based on our collective strengths and interests?"

Suggested time: 20 minutes

Using Learning Styles to Diagnose How Project Groups Are Working

- Divide the class into their project groups (or small groups if the whole class is working on a project together). Ask them to remind one another of their learning styles, then to discuss these questions:
  - What ah-ha's or insights do you have about your work together so far?
  - What are your next steps for using these insights through the rest of your work together?
  - What else do you need beyond knowing learning styles to effectively work together?
- Each group needs a volunteer to record responses and a volunteer to report those responses back to the large group.
- Debrief by asking how class members will use these insights in their work with other groups

Creating a Shared Understanding of the Past to Create a Shared Vision for the Future

Overview

Purpose of Unit Three

Learning Objectives:

- Encourage a creative approach to community work
- Introduce the vision process
- Understand how a shared vision moves a group to the Unity Stage

Other Purposes of the Session:

- Continue to learn about servant leadership
- Develop a shared vision out of which class projects can emerge (if doing class project)

In Unit One, the concept of servant leadership was introduced. In Unit Two, we discovered more about learning styles. Learning styles aid in helping people understand both themselves and others with whom they work. In the first two units, we observed and recognized servant leadership in others. During this session, we will look at these qualities as they apply to behavior.

In this unit, we will use what we've learned from the past to create a vision for the future. Questions to consider include: What are the strengths of the community? What are its challenges and weaknesses? In twenty years, if you got it right what would the community look like? Who would need to be involved?

In Unit Three, we will continue to fill the Servant Leadership Tool Box first introduced in Unit One. A skill for communities today is the ability to articulate a shared vision and then bring people together to implement that vision. This session will provide you with the experience of going through the vision process so you can use it with groups of which you are a part.

This unit will move the group toward a shared vision in the Unity Stage of Performing Communities.

Participant Agenda

I.   Welcome and Overview

II. Understanding Servant Leadership

BREAK

III. Seeing the World with New Eyes

IV. Creating a Shared Understanding of the Past
     to Create a Shared Vision for the Future

BREAK

V.   Bridging from Current Reality to Desired Future

VI. Closing Circle

Creating a Shared Understanding of the Past to Create a Shared Vision for the Future

Learning Objectives:

- Encourage a creative approach to community work
- Introduce the vision process
- Understand how a shared vision moves a group to the Unity Stage

Other Purposes of the Session:

- Continue to learn about servant leadership
- Develop a shared vision out of which class projects can emerge (if doing class project)

Questions to be Addressed:

- What does creativity add to community work?
- Why is a shared vision important for a community?

In Unit Two, participants built trust, in part, by sharing personal stories. During Unit Three, participants will collectively create their own community story through the timeline exercise and use that as a tool to create their shared vision with others in the group. Groups will articulate their experiences with the servant leadership concept thus far, demonstrate their ability to listen to others, and learn and practice new concepts such as facilitating from the side of the room, timeline, and visioning.

Unit Three focuses on the importance of a shared vision to twenty-first century communities and organizations. Forming and articulating a shared vision moves a group to the Unity Stage in the Steps to a Performing Community. Creating this shared vision comes when groups trust each other, learn to have meaningful conversations, and have the tools needed to better understand different perspectives and points of view.

Background for Lead Facilitator

During the Chaos phase a group learns that different perspectives and points of view are a positive thing. And while those in the group have come to enjoy being with each other, it is important they not lose sight of the work they have come together to do. A shared vision helps a group focus and agree on what it must accomplish.

By now, your participants should be comfortable with one another and better at self-facilitating. Your role during this session will be less directive and more about depth and details of the practices and capacities that have been introduced. The more comfortable individuals are in a group, the more able they are to concentrate on the content without worrying about how they will fit in.

Begin the session with a review of the leadership practices and capacities learned thus far and how they fit into the Steps to a Performing Community. Start by asking them how they are using the capacities in their workplace or their family. This question helps to cement the transference of this important knowledge to their real-life situations. What has worked best for each person? What are they learning about themselves? According to the best adult education theory, people learn best when they can build on their own experience and relate the new information to that experience, when they can practice or apply what they are learning, and when they can connect learning to real-life situations.

It is important to show participants specifically how these leadership capacities apply in the workplace and home as well as the community.

Creative Thought

Unit Three focuses on creating a shared vision for the community. This will generate exciting discussion among the participants. But the vision should not be a recitation of typical, trite ideas. So how do you stretch a person's perspective? A couple of exercises emphasizing creative thought will do just that—Seeing the World with New Eyes and Developing a Vision Process. Remember that during Unit One, creativity and creative thought were introduced as class members prepared their introductory resume. A bit more background might be helpful for the deeper exercises used here.

The dictionary defines creative as "characterized by originality and expressiveness; imaginative." Without the dictionary, it means something different to each one of us. Functioning in today's changing world requires creative thought, flexibility, risk, and resilience. We each respond to this challenge differently. A person's learning style predicts the way he/she will respond to change. People in the left quadrants love experimenting, taking risks, trying new things. Reflective people appear more cautious and require more time to observe and figure out their response. Taking time to practice reframing ideas is helpful to all learning styles. With practice, all of us can be more adept at creative thought.

Creativity is not just about artistic gifts but an expanded sense of the options and possibilities. Creative work requires risk because we have to leave our habitual way of seeing and let go of our assumptions. However, if we are going to solve our complex twenty-first century challenges, we must step out of our comfort zone and take some educated risks. Oriah Mountain Dreamer, author of *The Call: Discovering Why You Are Here* writes: "To create we have to risk learning something; we have to risk shaking up our assumptions with a new way of seeing. And we have to risk failure." We have learned that when we set expectations for expanded thought and ideas, provide an oppor-

tunity to practice, and then expect some application in real life, we have set the environment that encourages creative thought. Your leadership group, as it approaches Unity, is in a safe place to risk and experiment. As you debrief creativity, remind the class that the role of a twenty-first century servant leader is to create an environment where people can engage in creative thought safely and comfortably.

Vision

"Leadership is often about pointing folks in the direction they have collectively decided to take," comments Johnnetta B. Cole, former president of Bennett College for Women in Greensboro, NC. Vision describes a process of learning from the past, analyzing current reality, understanding and appreciating adversity, articulating values, and envisioning the preferred future. Because of the interactive nature of the process, participants are connected to one another and to the outcome. This connection is necessary if the Vision Process is to lead to action. As communities and organizations work to implement creative solutions to their complex challenges, a shared vision is the first step. The process and the resulting image enable us to see things whole and to grasp the interdependence and complexity of a community or an organization.

What is Vision?

Vision is to a community or organization what purpose is to an individual. "Vision provides a way to align people with a higher purpose so that they move in concert as they exercise their own judgment and release their full potential. When everyone is motivated by a common vision, they have tremendous alignment and forward velocity," points out Lynne Joy McFarland in her book, *21st Century Leadership.*

James Kouzes and Barry Posner in *The Leadership Challenge* define vision as "an ideal and unique image of the future." Vision is having an acute sense of the possible. It is seeing what others do not see. And when those with similar vision are drawn together, something extraordinary occurs. The vision should articulate a view of a realistic, credible, attractive future for the organization (or community), a condition that is better in some important ways than what now exists.

Why a Vision Process?

Vision provides a context for decision making and priority setting. It provides an opportunity for collaboration among diverse populations because of the agreement on a shared direction. Chaos in a group or organization is often the result of members not sharing a common vision. Each person may be operating out of a separate view of the organization's direction. There can be no agreement on action when each person has a different idea of the end result. A shared vision is, therefore, important for all groups, organizations, teams, families, or companies as they try to move through chaos. Today, we know that a vision—the image of the preferred future—is the key component of building and unifying a team.

In Boom Town, USA, the 7½—Keys to Big Success in Small Towns, Jack Schultz describes why communities who have spent time articulating and shaping a vision are much more successful. Schultz reports: "Vision marks the roadmap to success; it takes into account the destination, the surrounding terrain, and the roadblocks and hazards along the way. With vision, you can deter-

mine the best way to reach your destination." Further, he found: "Success didn't just happen. It was crafted. It was planned. It was inspired by people who dared to dream big." Schultz is quick to point out that vision alone cannot save a community. "Genius," Thomas Edison said, "is one percent inspiration and 99 percent perspiration." That one percent—in which the vision resides—makes all the difference. It guides the other 99 percent, giving life and meaning to the effort. Without the inspiration, without the vision, the perspiration amounts to nothing more than sweat.

Community Visions Do Matter

A great example of why visioning matters is Osceola County, Florida. In 1995 several thousand residents came together to discuss, describe, and dream of the ideal future for their community. Community Vision brought together the very diverse population to focus on the creation of a shared vision for a preferred future. The results were beyond expectation. Over 100 strategies were implemented in the first six years of the process. In 2001, the county 're-visioned' and more strategies were devised. The results of both stages are exciting: increased citizen participation in volunteer community efforts, enhancement of community pride and involvement, better utilization of community resources, grassroots involvement in prioritization of key community issues, emergence of new community leadership, and coordination of public services. The list goes on and on. This all came about because the county took the time to stop and envision its ideal future. Community Vision earned so much respect with the success of this project that it was selected as the conduit for hurricane relief after three hurricanes during the 2004 season wreaked havoc on the county. Their mission says it all: "to bring people and resources together to achieve the community's vision."

Another example is Pauls Valley, OK, a town that calls itself "Not Your Ordinary Small Town." With a population of slightly over 6,000, this town has defied the odds on what can happen when people have a vision and work together. During a citywide visioning process in 2000, residents identified a number of goals to be accomplished by 2010. One of those was to become a destination city with unique attractions. That "unique attraction" has become the world's first Toy and Action Figure Museum. With the help of local artist and toy designer, Kevin Stark, a committee was formed and the process got rolling. In October 2005 the museum became a reality and now attracts visitors from across the region and the state. The community created a new future by joining local assets to a powerful vision. This great idea became a reality because people had vision and creativity and believed that it could happen.

The Timeline Process—Tips and Details

This section is a detailed description of how to facilitate the timeline. Effective facilitation of a timeline requires a team of facilitators. If you must work alone, change the process by having small groups do timelines on the table. Have written instructions available.

Facilitation teams for the timeline exercise work best when one person serves as the verbal facilitator, helping the group generate comments and ideas, and the other serves as the visual facilitator, putting drawings on the timeline that record their comments. Have one person talk and the other draw and don't try to play each other's roles. The verbal facilitator must pay attention to the group and not worry about what is being drawn, just as the visual facilitator must be concerned with the visualization of the group's stories. A good timeline takes approximately 1 ½ to 2 hours.

Sign-In

The first part of the process is for participants to sign in on the timeline. They should all sign in with the same color markers, and then set these markers aside so that they aren't used for anything else. This helps keep track of the names as you move through the timeline. One facilitator stays at the timeline as people sign in, to distribute markers and give instructions. As was noted in the overview, instructions can also be placed on a nearby easel, but many people need verbal instructions as well.

Each person is asked to do two things when they sign in: write their name on the timeline date when they first came to the community (or the organization), then draw a significant event from the history of the community, the state, the country, or the world. Some may resist this part, but encourage them to do this sketch because it gets them thinking about the past and it generates interesting discussion among participants as they try to think of something to draw. Prompt this group by giving an example such as man landing on the moon. It is also important to tell them this is not an art class—that stick figures are encouraged. Simple sketches are fine. Keep the mood relaxed and fun. With refreshments, and a sense of humor, the group will join quickly in the fun.

Note: A community timeline can be used in many ways. The sign-in and your facilitation questions will be adjusted depending on the group. Always ask in preparation: "What do we want to get from the timeline?" This gives you a guide as to how you want people to sign in. If we are working with a leadership organization board you probably want them to see how the community has changed and therefore how the leadership needs to be different. You may also want them to see the history of the leadership organization and how it has changed to meet the needs of the community and the world. With this end in mind, you might ask this group to sign in on the date when they came on the board, or became aware of the organization. If we are working with a bank you might ask people to sign in when they entered banking. The key is to ask yourself: "Will this question get us the end result we want?"

Arrange the chairs as they sign in. Form a semi-circle around the timeline. Have them be as close as possible to the timeline wall and to each other. Leave just enough space in front for the two of you to work. Having the group sit close together helps encourage honest, informal telling of their stories. The seating arrangement allows participants to talk to the wall and the facilitator. People do not have to talk to each other—this creates a more open, freer environment.

Introduction of Exercise

This introduction can be done by either the visual or verbal facilitator or preferably both. Begin the timeline process with an explanation of why it is in the curriculum and how the group will proceed. Explain to the group that it is important to look back before we look forward to a vision or any strategic planning.

Tell the group that this is not a history lesson. It is an opportunity to hear the stories of the community or the organization from the perspective of the people who lived them. Individual participants will get to tell their stories, forming a collective story of the community at large. Explain that exact names, dates, and places are not important. There may be some differences of opinion in the group as some may see certain events differently than others. Assure the group that different perspectives are good.

The group is encouraged to pay attention to how the process is being done so that they can use it with other groups. There will be more explanation and discussion of the process at a later point.

Ask the group to put away pencil and paper; this session is about listening to others and sharing their own stories.

Finally, explain that one facilitator will ask the questions and that the other will illustrate the stories with simple stick figures. Reassure the participants that it is ideas that we are looking for, not budding artists!

Process Facilitation

This section expands on the role of verbal and visual facilitation. Each plays an equal part in making the timeline effective.

Verbal Facilitation

The verbal facilitator's job is to work with the group, ask the right questions and encourage participation. Remember, the timeline process is about stories. It is about people talking about the community from their own perspectives. If you start to ask for exact information or their theory about something, your group will stop responding. Stick to their memories and their experiences. Begin the timeline stories by asking the group, "Who came to settle this area? Why did they come? Why did they settle here?" Usually someone will have bits of information. Match that with what others know. Encourage the group to think about what they learned in school or from their family. If no one knows anything, move ahead.

Next jump to the early 1900s. Ask what life was like in this community or in this part of the country. Ask about industry—what did people do to make a living? People generally mention the development of industries, the railroads, etc.

Move into the '30s and '40s. Most people know very little other than the Depression and the beginning of World War II. In most cases, people are more comfortable talking when you get to the late '40s and early '50s. The age of the group will determine the time they begin contributing.

As you walk through the decades, you want to look to those people who have signed in for that time period. For example, suggest that those who signed in for the '40s talk about what life was like growing up in the community during that time. Try to make sure everyone contributes. Most will talk very naturally, but others are brought in when their name appears on the line. (See why having all the names in the same color—especially a color not used in the drawings—helps?)

You will find time getting away from you in a good timeline. However, do not overlook those people who signed in during the late '80s or '90s. They usually have very important things to say and may have been looking forward to their time in the spotlight.

Always remind yourself that this is the group's timeline, not yours. That means you must be respectful of their timing. They may be more interested in talking about the '50s more than the '80s. You will want to try to get them through the whole timeline but that may mean that some years are rushed through. Also, keep in mind that an event that seems significant to you may not be important to them. The timeline should reflect the common memory of the group, not the history of the community.

Learnings or Ah-ha's

Always conclude the timeline with their ah-ha's. The observations or the light bulbs are when you

"An African proverb correctly asserts that you can't know where you're going if you don't know where you've been. But, let history and past experience instruct rather than determine your destination."

—Johnnetta B. Cole

will observe learning in the group.

The visual facilitator can begin this list when the group starts talking about things that are difficult to be drawn—ideas, concepts and realizations. The verbal facilitator should call the group's attention to the ah-ha's when it seems like the timeline is finished and/or when your time is almost over.

Spend ten to twenty minutes on ah-ha's. Suggest first that they sit back and look at the entire picture. Then ask them to think about and talk about what they have learned. Usually the quiet, more reflective people become more involved in this part of the process.

Conclude the timeline by telling the group that they can continue to add to the timeline and ah-ha's throughout the day. Hallway conversations will be lively. People often return after lunch or break with additions.

Projects

If your program uses class projects, you will likely introduce the idea, in Unit Three. Action is an integral part of any leadership development program. If participants are to change their behavior, they must as Richard Harwood said, "think in concrete, practical terms about how they can use the new ideas and practices in their daily lives—they must try them!" Projects that take place within the context of the leadership program can provide that practice. In this unit participants will apply, analyze, and re-evaluate how they can use their new leadership capacities on a specific project. The project is the class members' chance to try out new leadership skills and learn through experience. It is their laboratory for learning about leadership, and how it forms and changes within a group. It can be a significant rehearsal for their role in addressing needs in the community as members of organizations or as advocates in the future. A powerful by-product of the projects is a tangible, visible result in the community.

The process of selecting projects can be painful for the facilitator unless the facilitator relaxes and allows the class to work through the process. This selection process is an integral part of the learning of selecting projects. Keep in mind that most organizations agonize when selecting projects.

Next steps

Divide timeline participants into small groups and ask them to discuss the implications of what they have learned. The timeline ah-ha's are an effective way to move into the discussion of transformed twenty-first century communities and leadership.

Some of the questions or issues you want to have emerge:

- *The 1940s: What was life like in WW II? Who provided the leadership? (women) What was life like after the war? (GI Bill of Rights)*
- *The 1950s: Describe life in your neighborhood. When did you get TV? What did we see on TV? When did you get shopping malls?*
- *Then 1960s: What music do you remember? What social unrest? What transportation changes, such as more cars, airplanes, interstate highways?*
- *The 1970s: Vietnam? Women's movement? Economy? Watergate and with it the lack of trust?*
- *The 1980s: Technology? Economy? Globalization?*
- *The 1990s: How did you find this community when you moved here? Newcomers generally see the community in a more positive way than those who have lived there all their life.*
- *2000+: Internet, iPods, Reality TV, ozone, Iraq, 9/11, Hurricane Katrina.*
- *Throughout: Continually ask: "What was the community like? How did the national and world issues affect the community? What were concerns and issues?*

Tips for Verbal Facilitation

Good facilitators learn to always watch people's eyes. The eyes will give you clues that the person has a thought and wants to talk. Use your instincts as to when to move on. Don't rush the group, but try to keep a good pace. Frankly, timing is the hardest part of doing the timeline. You want people to talk, but you don't want the group to get tired.

Many people wonder what facilitators should do about conflict. What if the group or several people get into an argument? This happens, and when it does, it is a good idea to step in and explain that, "This is what a leadership program is about—talking through the hard issues. Your group may decide that it needs to spend time later on in an in-depth discussion of some issues that have come up during this process, but today we just want to know the concern exists." As you work through the timeline, the concerns of that group and that community become very clear. If done in a group, the director or president can record those concerns for later discussion.

Never put events on the timeline before the group. This is the group's timeline. However, you may have some ideas in mind if you need to get the conversation moving. If it's important to the group, they will pick it up and talk about it, if not, just move on.

The pictures they put on the timeline encourages the group to start thinking about history. The drawings in the beginning are especially helpful. You might say: "Is this Johnny Appleseed up here? Why did somebody draw him? What does it mean?" However, we do not move from picture to picture.

Visual Facilitation (continued)

The responsibility of the visual facilitator is to create visual symbols to represent the thoughts of the participants as they are expressed. That is, to capture in simple, bold, colorful graphics, what people say. When participants see their ideas illustrated on paper, it assures them that they have been heard and helps them to move on especially in areas of conflict.

The illustrations should be very simple symbols representing the ideas people share. They should be mainly stick people, circles, lines, and tornadoes. Color is the most important part of sketching. The color sets the tone for a particular era. When a timeline is completed, the participants won't see events as much as they will see the mood, which is set by the colors. For example, the Vietnam War in the '70s is generally represented using brown and green – camouflage colors. The '50s can have lots of red hearts. The '60s can have lots of red and orange tornadoes symbolizing the chaos of the civil rights movement.

A timeline is one of the most effective ways to look back and learn from the past. It will be the first step in the Vision Process for your group. It is also an excellent way to build trust among a group. As participants share their life stories they build a sense of shared history that is invaluable as a team moves to Performing. In like manner, they also learn about life experiences they have never had. A shared history, lived or told, is important to move a group through chaos.

Caution: don't make the symbols too small. Your drawings should be large and bold. There is lots of space, and don't be afraid to draw on top of other things.

Creating a Shared Understanding of the Past to Create a Shared Vision for the Future

Learning Objectives

- Encourage a creative approach to community work
- Introduce the vision process
- Understand how a shared vision moves a group to the Unity Stage

Other Purposes of the Session

- Continue to learn about servant leadership
- Develop a shared vision out of which class projects can emerge (if doing class project)

Questions to be Addressed

- What does creativity add to community work?
- Why is a shared vision important for a community?

Before the Meeting (facilitation supplies and materials needed)

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Wall Charts

- Collaborative Communities, Facilitative Leadership & Capacities (from Unit One)
- The Best Test for Servant Leadership (from Unit One)
- Steps to Performing Community (from Unit One)
- Tool Box (List of Capacities and Tools used to date) (Under Construction from Unit One)
- Ground Rules for Meaningful Conversations (if made and established in previous sessions by group)

Premade Flip charts

- Prepare quotes for the wall (see suggested list)

Handouts

- Overview for Participants
- Participant Agenda
- Participant Handout #1 Timeline
- Participant Handout #2 Creating a Vision

Supplies

- Snacks
- Name tags
- Timeline Paper (approximately 4' height x 10' width)
- An assortment of everyday objects that could be used in other creative ways
- Non-permanent markers
- Flip charts (large sticky notes)

Creating the environment

Suggested Theme

As you move to a higher stage in the Steps to a Performing Community, the theme can become more simple, so as not to distract from the conversations and discussions. However, pay attention to these elements because when time is limited, theme, room set-up, and quotes can jumpstart the learning for the session. They set the stage for the unit's topic.

Because a couple of the activities are related to creativity, the items used for the exercises can be on the tables as the part of the theme. For example, if you want people to think out of the box, placing different, interesting boxes around the room would suggest that idea.

Room Set-Up

Begin and close the session in a circle. The group will move to tables of four to six people for the small-group activities. The timeline activity will require a long wall with space to form a semi-circle of chairs facing the timeline. The chairs can be more than one row deep, but should be close together.

Session Script

Session Overview

Welcome, Ah-ha's and Reconnecting	30 minutes
Understanding Servant Leadership	45 minutes
Break	**15 minutes**
Seeing the World with New Eyes	15 minutes
Creating a Shared Understanding of the Past to Create a Shared Vision for the Future	2 hours
Break	**15 minutes**
Bridging from Current Reality to Desired Future	30 minutes
Closing Circle	15 minutes
Total Time	**4 hours, 45 minutes**

As People Enter
30 minutes

Materials: Flip chart page, markers

As people enter, ask them to answer the question: What creative activity or activities do you participate in? Encourage them to think beyond the arts.

Encourage participants to write (or draw) their answers on the flip chart page.

Welcome, Ah-ha's and Reconnecting
30 minutes

Materials: Overview, Participant Agenda, Flip chart, markers

WHY: Create an environment where everyone feels comfortable and at ease participating. Expand participants' understanding of leadership capacities with more details and examples.

HOW:

Participants sit in a circle

❶ Welcome people back. Make necessary introductions.

❷ Give the overview of the day—concepts, agenda, and goals.

③ Report out on homework from Unit One. (Class participants were encouraged to visit a community site that they had not been to before, with a partner from the class, preferably someone they did not know well.)

④ Celebrate the skills and assets on the Leadership Capacities board (Tool Box). Then ask the group for their ah-ha's, thoughts, reflections, ideas, and questions that have come to mind since the group was last together.

Record ideas and thoughts on a flip chart

Questions to get the discussion started:
- How have you used your new capacities, especially learning styles?
- What did you learn about yourself from learning styles?
- How are you understanding and working with people in different ways?
- How are you seeing the community differently?

Understanding Servant Leadership
45 minutes

WHY: In the first two units, we observed and recognized servant leadership in others. During this session we will look at the qualities as they apply to the participants' behavior.

HOW:

① In small groups around tables, ask participants to share the acts of servant leadership they have identified since Unit One. Ask them to describe the characteristics and qualities of leadership they observed.

② Call out and record characteristics and qualities in the large group. Make a complete list of qualities.

③ Have participants identify one or two qualities that they possess and do well. Then ask them to share this in their small group.

④ Next have each person select a quality of servant leadership to work on personally in the coming weeks. Again ask them to share this quality with people at their table.

Say: *When you come back from break, please sit with a new group of people.*

Break	*(15 Minutes)*

Seeing the World with New Eyes
15 minutes

Materials: An assortment of everyday objects that could be used in other creative ways (e.g. odd keys, tools, etc.)

WHY: A vision that inspires enthusiastic implementation requires participants to think creatively.

The following activity will encourage creative thinking by challenging us to think of new uses for common objects.

HOW: *Rosabeth Kanter, a professor at Harvard Business School, says "Our first, or second, or third, or maybe even fourth solution will not solve the complex problems of today. It is not until we get to our fifth, sixth, or maybe even seventh or eighth solution that will we begin to find something that works."*

- Each table will work as a team. Put several everyday objects in the center of the room.
- Give the teams 1 minute to determine a creative way each object could be used.
- Have each team demonstrate how the object can be used.
- Give a funny prize to the winners.

Creating a Shared Understanding of the Past to Create a Shared Vision for the Future
2 Hours

Materials: Flip chart of white paper, non-permanent markers

WHY: Without a clear vision, we cannot know what we want the end result to be. A group rarely moves out of chaos without a clear and shared vision.

HOW: Learn from the past through a timeline, analyze our current reality (strengths and issues/challenges), and ask ourselves what ideas and practices we want to take forward and what we want to leave behind. Then we will envision our desired future.

❶ Begin with the timeline. Gather the participants around a long sheet of paper on the wall. Draw a line horizontally across the center and mark off decades. Ask participants to write their name on the timeline when they came to the community and to draw a picture of a time when they were involved in the community.

❷ After each person has written and drawn, facilitators encourage the telling of stories and experiences as they move down the timeline. Ask participants to explain their pictures. As participants speak, facilitators may draw additional pictures to illustrate stories.

❸ Ask if there are any other events in the life of the community that should be added to the timeline. Draw pictures of these.

❹ Ask the group for their ah-ha's. "What did you learn in the process? How has the world changed? What does this mean for our community? How are our experiences different?" Record these ah-ha's.

❺ Reflecting on the history portrayed in the timeline, participants should select two things they would like to take into the future and two things they want to leave behind as their community moves forward. Share these with the large group.

Participant Handout #1—Timeline

❻ As people break, provide handout #1—Timeline so participants can better understand how and why the timeline was used.

Say: *Please join a new group of people at your tables when you return from break.*

Break	*(15 Minutes)*

Bridging from Current Reality to Desired Future
30 minutes

Materials: Sheets of white paper, non-permanent markers

WHY: To consider how participants can contribute to the community.

HOW:

1 Keeping in mind the lessons learned from the timeline, analyze the community's current reality.
- What are the strengths of the community?
- What are its challenges and weaknesses?
- Record these on one sheet of paper.

2 Thinking about the strengths and challenges just listed, on another sheet of paper, table groups should draw their vision of the preferred future. In twenty years, if they got it right what would the community look like? Who would need to be involved? They should be encouraged to use pictures not words.

Participant Handout #2—Creating a Vision

3 When the pictures are finished, share them with the large group. Facilitators and participants should pull out themes, answering the question: "What did the whole group really say?" Distribute Handout #2 Creating a Vision.

4 Ask: *Now that we have considered your vision for this community, what will you do differently in your community?* Ask participants to share their responses with their small groups. Then ask them to share some of these comments in the large group.

Closing Circle
15 minutes

WHY: To debrief the events of the day.

HOW: With the group gathered into a circle, reinforce the importance of the vision process. Ask participants to suggest ways to use the vision process in the community, at work, and at home.

Relate the vision to Steps to a Performing Community, emphasizing how developing a shared vision moves a group through chaos to a state of unity. Ask, "How is our group moving toward unity?"

Timeline

Purpose/Objectives

Use this simple process to:
- Help groups develop a shared understanding of the past and serve as a foundation for envisioning and planning for the future.
- Help individuals who are coming together find their commonality as a tool for building connectedness and community within the group.

Benefits

When used correctly and debriefed effectively, this process can:
- Create a sense of community within a group by providing a shared experience and shared identity based on the past.
- Provide insight into complex issues.
- Help people work through difficult history and lead a group toward healing.
- Bridge the past with the present and the future.
- Help participants appreciate the "lens" through which other people in the group view things.
- Facilitate documentation of lost stories.
- Reveal issues that need work and lead to intentional action to resolve those issues.
- Lift up the values by which the group functions.

Background

As a group works together and the make-up of the group evolves, the history of the group and how it came together may become lost. People can get caught up in the day-to-day, losing sight of the original vision and key events that have shaped the group. Routine decisions and actions can start to happen without a thought as to why. Conducting a timeline process can be an incredible way to reconnect with the past to understand the present and plan for the future.

Some of the material included in this document was adapted from Mary Jo Clark and Pat Heiny's *Timeline: A Complete Guide to Facilitation*.

> *"Without roots, plants perish. Without history, the present makes no sense. Without a historical base, a vision is rootless and doomed."*
>
> —Lee Bolman and Terrence Deal

Creating a Vision

Vision is:

- A roadmap to the future.
- A picture of the future you really care about.
- A valued image of the preferred future.
- An expression of your core values, your sense of purpose.
- A dream in action.

"Vision is to a community or organization what purpose is to an individual."

—Mary Jo Clark, Pat Heiny

Vision reminders:

- Without a vision, we do not know what we want the end result to be.
- Communities, corporations, organizations, and businesses all need a vision.
- Vision is critical for building the relationship, spirit, feelings, and commitment of people in the community.
- Vision is key to moving a group out of chaos.
- The steps of vision include: learning from the past while analyzing the current reality, focusing on all people involved, and visualizing the preferred future.
- Using a timeline is one of the best ways to get people to talk about and understand the past.
- It is important to look at the people who make up your community or organization and become conscious of their different needs and concerns.
- Values are the way you measure the rightness of your vision. Does the vision reflect your values?
- Drawing our vision will increase creativity and energy and expand thinking. We carry pictures in our minds.

Unit Three Extras and Additional Materials

If you want more context ...

Additional or alternate handouts

Unit Three Alternate Handout #1 "Facilitation From the Side of the Room"
This handout describes how people can influence and lead groups by using their knowledge of Stages to a Performing Community and Learning Styles. This handout is found behind this section.

Unit Three Alternate Handout #2 "Meaningful Conversations – Your Role"
This handout describes conversations as an act of leadership and how participants can better engage in them. This handout is found behind this section.

Lecturette: Vision

Alternate activity for investing in a vision:
To set up the idea that everyone can invest in and contribute to a vision, use the following points:
- Visions are implemented, in community or organizations, both formally and informally.
- Formally, strategic planning follows the Vision Process. Most participants know the steps of strategic planning. But, most groups start with the planning, not the vision.
- Informally, everyone in a group can help make the vision happen by consciously acting in ways that support the ideas generated. For example, if one community vision theme is beautification, a church can say—let's add to the community vision by making sure our property is landscaped, cleaned up and beautiful.

Suggested Time: 5 minutes

If you want to increase knowledge of/interaction with the community ...

The Arts

Visit or tour your local theater company, opera house or community band. Ask the performers questions such as:

- How do you set the stage for a show?
- How do you plan what your season will include? How far in advance?
- How do you move from your vision to reality?
- How could people in the community get involved in or support your organization?

Ask debriefing questions such as:
- What did you hear that you can apply to your own organization?
- What stood out to you?

Suggested Time: 60-90 minutes

Local History/Museums and Historic or Preserved Buildings

Visit or tour your local museum or an historic structure that has been or is being renovated or preserved, such as those buildings on the National Register of Historic Places. Ask a guide or a local history expert:
- What was the vision that led this organization to preserve these items or this site?
- What steps were taken?
- What has made the process difficult?
- How could people in the community get involved in or support your organization?

Ask debrief questions such as:
- What can we learn from that process that will help us move similar processes forward today?
- What mistakes have been made from which we can learn?
- What elements of our history should celebrate our future vision?

Suggested Time: 60-90 minutes

Newspaper Office

Visit or tour your newspaper to learn its history and consider its role in preserving community history. Ask an editor, publisher or reporter:
- What is the role of the newspaper?
- Is the newspaper responding to changing times and technology to prepare for the future?
- Why does preserving events matter?

Ask debriefing questions such as:
- How does the official or formal record of events compare to stories or informal records?
- How does the public record shape the public's perspective on events?
- How can a relationship with media help leaders achieve their goals? How can it be a barrier?

Suggested Time: 60-90 minutes

Government/Economic Development Applications

Invite a member of your planning commission, resource and conservation district council or economic development group to attend this session. Ask the representative:

- How do you gather community input about vision and goals?
- How does your group function, and how do the members work together?
- What is the role of our community's history in informing our vision for the future?
- How do you anticipate the community changing over time? What should leaders in the community be doing to prepare for and influence those changes?
- How could people get more involved in these groups?

Ask debriefing questions such as:

- How do community visioning and planning differ from organizational visioning and planning? What can organizations learn from community visioning and planning?
- How much opportunity do we have to influence our community's history?
- How could storytelling play a role in influencing community change?

Suggested Time: 60-90 minutes

Business Application

Tour or invite a member of a family who owns a long-standing locally-owned business in the community. Ask questions such as:

- How has your business changed in response to changing times?
- What was the original vision of your business? How has it changed or expanded
- What changes in our community history stand out for you?

Ask debriefing questions such as:

- Which businesses or business clusters have contributed to our community identity and why?
- What should our community be doing to anticipate and respond to changes in the business environment?
- What is our vision for the kinds of commerce our community should promote in the future?

Suggested Time: 60-90 minutes

If you want to practice a related capacity ...

Drawing Your Vision

There are many approaches to creating a shared vision that can be used to complement, or as a substitute for, timeline in this unit or the Consensus-Decision Making Process described in Unit Four. Another approach explained below is found in the Trustee Leadership Development, "Preparing Leaders and Nurturing Trustees: Educator's Manual." The willingness and ability to envision a preferred future is a creative process. Naturally, some people will express their visions creatively as well. An individual or group vision may take the form of a poem, a dance, a song, or a drawing.

- First, create a time of individual reflection, such as a guided imagery "dream" of an organization's future. After dreaming and reflecting on their own, the participants take a few minutes to share the experience with one other person. Next, small groups form and talk about what they envisioned. Together, the small group members draw one picture incorporating the core themes from their individual visions. These pictures are presented and explained to the full group.
- The facilitator(s) helps the group to identify and build consensus around common themes. Before the group moves on to setting goals and taking action, a volunteer from each of the small groups is identified. These volunteer "Vision Painters" draw the common visions of the whole group. Alternatively, everyone can be involved in creating a collage of the group's common vision rather than a common portrait.

Suggested Time: 60-90 minutes

If you want an energetic activity …

Bridge-Building Exercise

You will need the following supplies for this activity:
- 1 large piece of paper (8 ½ x 14) with "Current State"
- 1 large piece of paper (8 ½ x 14) with "Ideal Future State"
- 2 per person: Blank, large name tag-like stickers
- Brown Bags containing the following:
    ° Coffee cup
    ° 2-4 large marshmallows
    ° 10-12 small marshmallows
    ° 10-12 coffee stir sticks
    ° 3-4 rubber bands
    ° 8-10 paper clips
    ° handful of toothpicks

Step 1 Instructions: On the table are two sheets: one labeled "Current State" and one labeled "Ideal State." Also on the table are additional blank name tags. Make sure that each person at the table has two additional blank name tags. Have participants work individually to begin with. On one blank sticker ask participants to record their thoughts:
- Say: Consider yourself as a facilitative leader. Ask yourselves, "What is my current state? How am I already different than when I first began learning about facilitative leadership?" (Note: You can also ask a group to consider the current state of your community or the leadership class itself.)
- On one blank sticker ask participants to write about the "ideal future state:" "How do I see myself operating ideally as a facilitative leader 2 years from now?" (Note: This question relates to "If we got it right" and can be applied to an issue or group/organization accordingly.) Give participants 2-3 minutes for each question.
- When everyone is finished, have each person share with the others at the table what each person wrote for each state (Note: You can facilitate a call-out of the future ideal states from each table.)

Step 2 Instructions:

- Have participants separate the "current state" sheet and the "ideal state" sheet by about 1 foot.
- A brown bag will be distributed at the table by the facilitator, but table groups cannot look inside of it.
- Each table is going to have to work together shortly following a few rules.
- Hand out the brown paper bags, putting them directly between in the two 8.5 x 14 sheets.
- Give participants the following rules to follow for this activity:
    - After emptying the contents of the brown bag on the table, table groups will have 1 minute to plan as a group – they can't touch anything.
    - The task is to build a bridge to the future between the current state and the ideal future state (Note: This is the first time during the activity that you'll identify the task as "bridge building.")
    - Table groups will have 3 minutes to build a bridge connecting their current and ideal states.
- Give the instruction to open the brown bags and begin building following the above rules.
- Facilitator calls out when 1 minute is up.
- Facilitator calls out when 3 minutes are up and table groups should conclude building.

Ask debriefing questions such as:

- What were the challenges you faced in building the bridge?
- What enabled you to meet the challenge?
- What can we learn from this exercise that we can apply to the situation you thought about at the beginning of the exercise?

Suggested Time: 30-45 minutes

If you want to ask more questions ...

Questions to use in debriefing sessions, opening or closing circle

- What does creativity add to community work?
- What is hard about being able to draw in front of a group?
- Why is it important to be able to facilitate from wherever you sit in the room?
- In what ways is our class experiencing chaos? How are we managing it?
- What community issues seem to be important to many of us in the class? What "pet" issues are there for individuals in the class? What opportunities might we have in the future for learning more about, or even debating, these issues?
- What do we know about the people who settled this area?
- How do the children and youth of our community view it? What might their vision be? What stories do we want to be sure they hear from us?

Suggested time: 15 minutes

If you want to connect the topic to the class project(s) …

Additional or alternate handouts

Unit Three Alternate Handout #3: "Projects – Doing Community Business Differently"
This handout describes how class projects act as a learning lab and hands-on experience for class participants. This handout is found behind this section.

Creating Your Project from the Vision Themes

WHY: Projects are an important part of the leadership program because they afford participants the opportunity to practice newly learned leadership capacities in a safe environment.

HOW:
1. Following the timeline process, post the themes that emerged from the Vision around the room. Have people gather at the theme that interests them. Groups should be between four and eight people.
2. Each team should brainstorm ideas for a project. Have someone in the group record on a flip chart. You should assist their thinking by explaining the purpose of projects and giving criteria they should follow.
   - The purposes of the projects are:
     - team-bonding
     - low-risk experience of civic involvement
     - opportunity to practice leadership capacities
     - raise community awareness of leadership program
   - The project should:
     - be accomplished in 9-12 months
     - be within budget
     - serve the local community
     - not require permission-granting from outside the local community (i.e. projects involving state or federal organizations)
3. If applicable, tell each team to meet before the next session to select a project and prepare a short presentation for the next session with a timeline for completion. Distribute Alternative Handout #3: "Projects – Doing Community Business Differently."
4. Ask each person to say how it feels to begin to move to a concrete application of their skills in the project. Assign homework to meet with project groups to determine project topics and plans.

Facilitation from the Side of the Room

- Look at the desired end result! Where does the group need to go in this meeting? In future meetings?

- Use your knowledge of performing communities to identify the stage of your group and what they need to move forward.

- Know people in the group. What is their learning style? What motivates them? What is their experience?

- Use the uniqueness of each person to build the team.

- Ensure that everyone is included. Honor everyone's contribution.

- Help keep the group focused on their purpose and vision.

- Encourage revolving leadership.

- Help the group find common points of agreement.

- Learn the power of asking questions.

- Celebrate accomplishments of individuals and the group as a whole.

"Facilitation is the art of drawing out what people intrinsically know and letting them own it. It is the art of observing, reflecting, guiding and giving back."
　—RUTH HILD

"You don't have to be in charge to help develop a group that works, just facilitate from your chair using twenty-first century leadership capacities."

—MARY JO CLARK, PAT HEINY

Meaningful Conversations—Your Role

Conversation

"Conversation is the way we discover how to transform the world together," observes Margaret Wheatley. If we don't really talk to one another nothing will change. We must recapture the significance and value of conversation.

- The practice of conversation takes COURAGE, FAITH, and TIME.
- Good conversation connects us at all levels.
- We need to listen for what's NEW AND DIFFERENT and see what SURPRISES us.
- We must be willing to be DISTURBED—to have our ideas challenged.
- We should acknowledge one another as equals.
- We don't have to let go of what we believe, but we do need to be curious about what someone else believes.
- Don't rush the thoughts; take time to think and reflect.
- Let the conversation be messy.
- When we listen with less judgment, we always develop better relationships with each other.
- If I want you to acknowledge my gifts, I have to be curious about yours. I have a responsibility to look for and know your gifts.

"At the very heart of leadership – indeed, in its very soul – is the art of conversation, the ability to create a dialogue that others will willingly join."

—DAVID WHYTE

Advice to the Conversation Host

In the beginning of a conversation it is important that everyone speaks. They will speak from different perspectives. They will not connect. It is the tendency of the conversation host to tie things together. But it is important to let go of that impulse and just sit with the messiness. Each person's contribution adds a different element or spice to the whole. If we connect things too early, we lose the variety we need.

Projects— Doing Community Business Differently

Participating in a project in the KCLI program is essential. The project is the learning lab— the hands-on experience. You wouldn't take a chemistry class without a lab or learn to cook without entering a kitchen. The project is an opportunity to experience working with others to solve a problem—to create something positive. It also helps take a risk in a safe environment.

- Projects should develop out of your vision.
- The best projects are the result of your passion.
- Keep in mind the Steps to a Performing Community. Don't forget the importance of gathering.
- Get to know your team. Spend time building trust.
- Know each others' learning styles and focus on them as you work.
- If people fail to actively participate be sure to find out why and correct the problem.
- When chaos strikes, use the checklist in Steps to a Performing Community to learn what needs to be done to move on.
- Make sure participants feel part of the team, understand their roles and actively engage in group activities and discussion.
- Facilitate from the side of the room. Remember everyone is responsible for the success of the group.
- The purpose of the project is to learn how to work within a team. Evaluate your groups' ways of functioning on a regular basis.
- Do not measure success by the magnitude of your project. Success is a group that learns to work well together and accomplishes an objective.

"If we are going to survive we must build communities of caring and connection."
—Cecile Andrews, *The Circle of Simplicity*

"Projects are a way of putting our new capacities into practice."

—Mary Jo Clark, Pat Heiny

UNIT FOUR

Practicing Consensus Building

Overview

Purpose of Unit Four

Learning Objectives:

- Learn about ways groups work together
- Help the group learn to work through chaos stage to become a performing community
- Gain insights about group process, consensus-building, and leading from the side of the room

Other Purposes of the Session:

- Add clarity to project selection
- Apply Learning/Thinking/Working Styles to group functioning

In Unit Three we learned the process of developing a clear, purposeful vision and saw how that vision can drive us toward creating effective communities. Implementing our vision now depends on building effective groups. Those groups must work as performing teams if the vision is to be realized.

Most of us belong to many groups—our personal, community, and professional lives depend on their effectiveness. Think of all the groups that you are a part of. How do they work? How do the group members behave? What is the feeling in the group? Are they effective? Do people grow as a result of being part of the group?

Have you ever wondered why some groups never seem to work while others are quite effective? Those who have studied groups know that groups have stages; they mature in the same ways that individuals do. The key task for a facilitative leader is to learn how to help groups move through these stages, from gathering to chaos to unity to performing. We will explore the importance of effective community teams in Unit Four.

Participant Agenda

I.	Welcome and Overview
II.	"Groups We Know" Exercise
	BREAK
III.	Rating My Facilitative Leadership Behaviors
IV.	Introduction to Consensus-Building
	BREAK
V.	Tools for Reaching Consensus
VI.	Closing Circle

Practicing Consensus-Building

Learning Objectives:

- Learn about ways groups work together
- Help the group learn to work through chaos stage to become a performing community
- Gain insights about group process, consensus building, and leading from the side of the room

Other Purposes of the Session:

- Add clarity to project selection
- Apply Learning/Thinking/Working Styles to group functioning

Questions to be Addressed:

- What does a performing community look like?
- How does understanding learning styles enhance group performance?
- How do we build consensus?
- How can we learn to work together?
- How do we facilitate from the side of the room?

In Unit Three we learned the process of developing a clear, purposeful vision and saw how that vision can drive us toward creating effective communities. Implementing our vision now depends on building effective groups. Those groups must work as performing teams if the vision is to be realized.

Have you ever wondered why some groups never seem to work while others are quite effective? Those who have studied groups know that groups have stages; they mature in the same ways that individuals do. The key task for a facilitative leader is to learn how to help groups move through these stages, from gathering to chaos to unity to performing. We will explore the importance of effective community teams in this unit.

Implementing our vision now depends on building effective groups

Background for Lead Facilitator

"Why work in groups?" The short answer is that challenges facing communities are too complex for one person or one organization to solve alone. Developing and implementing long-term solutions demands the expertise and energies of many people, often from diverse backgrounds.

A long answer is that we work in groups because solving the problems in our communities demands that we learn to work together toward common objectives. Building relationships with people who are from different backgrounds and life experiences is the first step in addressing these complex issues. By getting to know people of different races, cultures and life experiences on a deeper level, we develop trust and new perspectives that enable us to work together on creative solutions to tough issues.

In his work on group dynamics, Bruce Tuckman* observed that the work of groups typically moves through predictable stages. He reminds us that groups usually are not effective until they reach the stage of performing. Remind participants of the four stages of group formation.

1 Gathering (forming): Group members get to know one another in a polite way.

2 Chaos (storming): Group members espouse their individual ideas and opinions, disagreeing and debating with one another. The team struggles over purpose and goals, and members vie for leadership and influence until the team gets organized.

3 Unity (norming): Group members settle into working together, are unified as to purpose, and begin to become a cohesive group.

4 Performing (performing): Group members become a working unit and produce results.

Researchers tell us that it takes at least 19 hours of intentional work to get a group to the performing stage. The process is fluid and the group moves back and forth through the various stages depending on the group make-up and the issues it is confronting. Think back over (or visit with the facilitators for) the first three units. Consider the changes in group dynamics and functioning from that first session to now. It is no accident that this material on consensus building is introduced at this point in the curriculum. Regardless of how your class (group) is structured, it should be approaching the critical threshold to be ripe for consensus building.

Signs of an Effective Group:

- Positive interaction
- Active listening
- Creativity valued
- Clear roles
- Actively works toward vision
- Process for resolving differences
- Respect for skills and talents

- High group morale
- Intense loyalty
- Strong team identity
- Commitment to joint work and action
- High confidence in accomplishing the task
- Positive, respectful, open meetings
- Ideas used to build a better solution

* Adapted from Donald R. Forsyth, *Group Dynamics.* Florence, KY: Wadsworth Publishing Company, 1998, p. 155.

Why Groups Have Conflict

Remind the group that conflict within groups is normal and natural. You can expect it to come in any of four predictable ways:

- Personal conflict occurs between individuals. It may be a difference of opinion on an issue or just a lack of personal rapport.
- Issue conflict occurs when a group or community doesn't hold a shared vision of the group's goals or work.
- Procedural conflict occurs when people disagree over strategy or timing.
- Competitive conflict occurs when groups vie for the same resources or recognition.

Moving the Group Out of Chaos

Chaos or conflict, while it looks and feels messy and can be uncomfortable for some people, is not inherently negative. If the group knows how to identify it for what it is, it can be used as a productive stage—one that generates creativity and energy. Think of an ineffective group and you will recognize chaos:

Type of Chaos	Why Does it Happen?
Individuals thinking about self	Vying for leadership
Jockeying for position	Lack of role clarity
Competition arises	Members look to the leader to make decisions
Cliques surface	Not all views are considered
There is conflict and those who are uncomfortable with conflict withdraw	Discussions are circular, ego-based and one-sided
Struggle over purpose and goals	Win-lose attitude

During Unit Four you will be introducing techniques and tools that will help your group (and others they work with) move from chaos to performance. Remind them often that the process is normal.

The Key is to Focus on People

An important part of moving a group through chaos or conflict is focusing on the people in the group. Each person must realize the gifts and talents he/she brings to the team as well as understand how those talents will be used in the work of the group. Knowing our role on a team is important to our sense of belonging to the group. We need to intentionally develop all the skills and resources people possess to make it possible for them to lead productive lives, build healthy relationships, and contribute to the team's life. Having people understand their learning style is essential to this. The activity "Rating My Facilitative Leadership Behaviors" reinforces this point.

Using Consensus to Help a Group Move Forward

It is important to help the group to understand the difference between total agreement and consensus-building. People have deeply held beliefs that at times are in conflict, but in an effective

democratic society we must learn to work together and come to agreement. Consult Handout #5 Tools for Reaching Consensus for necessary steps.

Consensus is a process to reach decisions that honors the wisdom and expertise of all. Inherent in the process is:

- Valuing others—believing all people have gifts and talents.
- Believing each person has "a piece of the light."
- Listening to others with an open attitude—not speaking immediately after the previous speaker—"do not rush past wisdom."
- Respecting others—honoring their perspective—"I want to use your knowledge in my understanding."
- Believing that there is value in unity—being willing to discuss until we can agree on the "best path."
- Being willing to change your mind.
- Not speaking unless we have something to add to the discussion.
- Remembering this is a process to empower the minority because they will know that a decision will not be made without their support.
- Avoid identifying positions with people—make it okay for people to change their positions— "ideas are important not who said what."

Using Appreciative Inquiry to Build a Group's Capacity

Pay attention to the construction, scope, and assumptions of the questions you ask. When working with groups, spend time crafting the questions they will address:

- Start by discussing the end-in-mind, or purpose, for the discussion or process.
- Work with colleagues to write down several questions relevant to the topic.
- Discuss and rate the questions:
  ◦ Which is best constructed to promote reflection and creativity?
  ◦ Which has the right scope of the end-in-mind?
  ◦ What are the underlying assumptions embedded in each question? The goal is not always to make the question assumption free; work to make sure it has the right assumptions to move your group forward.
- Experiment with changing the construction and scope to get a feel for how each can change the direction of the inquiry.
- Give each question the "genuine test." Is this a question to which we do not already know the answer? If we already know the answer or have a "right" response, it is not inquiry.
- Run the question by an outside key informant to see how well the question works and where it leads the discussion.

Facilitating From the Side of the Room

The art of asking questions, as described above, is one of the most important abilities for a facilitator and is another technique for moving a group through chaos to unity. A well-placed question provokes problem solving, creativity, and action. When you ask questions, the group will seek its

own advice and not waste time rejecting your advice. When it seems there are no answers and when groups seem to be struggling and lost, an effective question can bring the group back. It is frequently the well-placed question that opens up a road block and gives the group the impetus to move ahead. Note that appreciative inquiry questions do not have to be posed by the facilitator only. It is possible for a participant to change the direction of a group dialogue simply by asking a relevant question in appreciative inquiry style. Handouts 2 and 3 provide a meaningful foundation for this type of work in groups. Review them prior to this session if you need a refresher.

Tool for Practicing Listening

Work with your participants to practice active listening. One method is the Dyad. The Dyad involves a listening and talking exchange between two people (a triad is sometimes formed in the case of an odd number of participants). It is the exchange of supportive or constructivist learning (both terms are used interchangeably). Dyads are useful for examining experiences in depth. They help us as we work through feelings, thoughts, and beliefs that sometimes produce passivity, undermine confidence, or cause interference in relationships.

The talker might mention successes, problems, or situations that he or she would like to handle better; thoughts about an issue or experience; feelings about prior experiences that may be affecting his or her present or future functioning; or his or her learning style.

As it is with other listening structures, the guidelines allow each member of the Dyad to talk for a given amount of time while his or her Dyad partner listens attentively. Everything said in a Dyad is confidential.

Guidelines

- Each person is given equal time to talk.
- The listener does not interpret, paraphrase, analyze, give advice, or break in with a personal story.
- Confidentiality is maintained.
- The talker is not to criticize or complain about the listener or mutual acquaintances in his or her turn.

Working Together As A Group

The spectrum of working together in groups usually includes some version of partnerships, coalition building, and collaboration. It may be important for participants to understand that there are different types of group work that allow a performing group or community to emerge. Working together is a continuum.

Partnerships

Partnerships are common community structures formed between individuals, organizations, government agencies, and businesses that want to combine forces for results that match their own organization's best interests. In "*In it for the Long Haul: Community Partnerships Making a Difference*," a 2001 survey done by the Pew Partnership for Civic Change, business, government, and nonprofit leaders in the two hundred largest cities, respondents cited a number of payoffs for part-

nerships beyond just the organizations involved or the specific issue addressed by the partnership:

- Community partnerships raise visibility on local issues: it's hard for communities to solve problems they don't know about.
- Partnerships can help communities set priorities for the allocation of resources.
- Partnerships can unleash new talents and resources to address old and new problems and opportunities.

Further, a clear majority of community leaders serves on boards and invites representatives from other sectors to serve on these boards. Partnerships, according to these executives, are alive and well and making a significant difference in the life of the community.

Coalition Building

A second type of joint work strategy is coalition building. Coalitions can be informal or formal arrangements that bring diverse groups together for joint action on a single issue or a set of issues. Members may have very different motivations for joining the coalition. Coalitions can be short-term or long-term, but throughout members retain their individual identities, goals, and missions. Coalitions are formed for joint action to advocate to stop something or to start something. Groups gather around traffic, crime, smoking, economic development—you name it.

Collaboration

The third type of community structure falls under a broad category called collaboration. Collaboration means simply "to work together," but its larger definition has a clear set of requirements and assignments (Chrislip and Larson, 1994, p. 5). Both a process and a goal for community work, collaboration allows multiple stakeholders in a community to work together toward a common purpose, building on the community's resources, talents, and assets. Understandably, this basic definition is a key step in the journey to a performing community. This topic will be elaborated on and expanded in Unit Five.

Summary

In Unit Four you will be helping participants develop the skills and capacities to move any group of which they are a part from chaos to performance. Continue to remind the group that conflict is normal and can be very productive within a group. This session will help the group understand the value of group performance within twenty-first century communities and the techniques that can be used to organize groups to perform.

Practicing Consensus-Building

Learning Objectives

- Learn about ways groups work together
- Help the group learn to work through the chaos stage to become a performing community
- Gain insights about group process, consensus building, and leading from the side of the room

---

Other Purposes of the Session

- Add clarity to project selection
- Apply Learning, Thinking, Working Styles to group functioning

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Before the Meeting (facilitation supplies and materials needed)

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Wall Charts

- Tool Box (list of processes, concepts, and tools presented thus far in the class)
- (Optional) Servant Leadership Wall (as a visual reminder for participants)
- Performing Communities
- Previous charts as appropriate

Premade Flip charts

- Premade Flip chart #1: Groups We Know
  - Describe its mission
  - Describe its membership
  - Share any known results or outcomes
  - How was the group structured?
  - Who serves as the group's leadership?
  - What style of leadership is used? (provide description)
  - How are decisions made?
  - Describe the challenges and strengths the group faces working together

Handouts

- Overview for Participants
- Participant Agenda
- Participant Handout #1 Rating My Facilitative Leadership Behaviors
- Participant Handout #2 Appreciative Inquiry–Asking Powerful Questions
- Participant Handout #3 Facilitation from the Side of the Room
- Participant Handout #4 Consensus Decision-Making Process
- Participant Handout #5 Tools for Reaching Consensus
- Participant Handout #6 Vehicles for Working Together

Supplies

- Non-permanent markers
- Manila envelopes
- 8 ½ by 11 paper
- Flip charts
- Sticky notes
- Enough quarters for each participant to have one

Creating the environment

Suggested Theme

For this unit you might consider using the theme "Working Together is Better" and the idea of teamwork. Decorate the tables and the room with local team sports gear, team sports (like basketball, soccer, baseball, football, etc.) equipment, and logos. Baseball caps or helmets could be passed around. How the theme applies: Working together with a group of people is meant to be fun, just like when playing team sports. The goal is to win, so scoreboards on the walls could read "Success." The equipment could represent the resources that allow a group to function/play the game. Passing a ball could represent the importance of communication between team members and use of all team members' skills and insights. Whistles could be used to signify the reminders that are needed to keep the team from fouling. Depending on the level of creativity you want to invest, you could even play pep band music or "Take me out to the ballgame" types of songs and pass out Cracker Jacks or peanuts. Reinforce that even while a team may have a captain, coach, or quarterback who leads, every person is important and must do his or her part and work for the same goal in order for the team to be successful.

If you use a theme, be sure to discuss how it relates with the class.

Room Set-Up

Table rounds for 4-6 people

Session Script

Session Overview

Welcome and Overview	30 minutes
"Groups We Know" Exercise	45 minutes
Break	**15 minutes**
Rating my Facilitatative Leadership Behaviors	45 minutes
Introduction to Consensus-Building	30 minutes
Break	**15 minutes**
Tools for Reaching Consensus	60 minutes
Closing Circle	30 minutes
Total Time	**4 hours 30 minutes**

As People Enter
15 minutes

Materials: Post wall chart with title "Groups that Work Well" for participants to use in their entering activity.

Have participants write on a wall chart the name of a group they know of that works particularly well. Mingling with the participants, tell them that we will be using their responses later in the session; encourage them to be thoughtful and write down a group they are familiar with.

Welcome
30 minutes

Materials: Overview, Participant Agenda, Chairs arranged in a circle.

Welcome participants back. Say: *Today's unit on groups gives some great opportunities to learn what it takes to make groups work well. We are going to identify some of the ways groups work together, and focus on practicing reaching consensus because this is an important skill or tool that many emerging leaders have not yet encountered or fully mastered.*

AH-HA'S FROM LAST SESSION

Suggested questions:

- What did you think about since the last session?
- How did you apply your new skills?
- What further questions about the timeline activity did you have?
- How is your awareness of servant leadership changing the way you act at work or at home?
- Think back to the community vision we developed. What might the vision of another group within the community look like?
- How did you use your facilitative leadership capacities during your project team meetings?

OVERVIEW OF THE DAY

Briefly go over what the group will learn during the course of the day.

Learning Objectives:

- Learn about ways groups work together
- Help the group learn to work through chaos stage to a performing community
- Gain insights about group process, consensus building, and leading from the side of the room

Other purposes:

- Add clarity to project selection
- Apply Learning, Thinking, Working Styles to group functioning

Take time to explain any logistical issues (meals, traveling, facility, etc.) and introduce any visitors/key people that haven't previously attended sessions.

"Groups We Know" Exercise
45 minutes

Materials: Flip chart, Premade Flip chart #1–Groups We Know, sticky notes

WHY: Reconnecting and transitioning from Unit Three. This is an important transition point from reflection to action. Groups (this one and all others) must learn to diagnose the right action and carry it out if vision is to be realized. This unit will continue our understanding of the group processes that lead to a performing community.

HOW: Divide the group into teams of four. If any participants put the same example (of a group that works well) on the wall when they came in, they should not be in the same discussion team together.

Once in teams, ask each person to briefly share what they know about a group that they believe works well—the team should be encouraged to ask the questions listed below (and written on Premade Flip chart #1), participating in the discussion. All of this should take place in 5 minutes or less.

GROUPS WE KNOW
- Describe its mission
- Describe its membership
- Share any known results or outcomes
- How was the group structured?
- Who serves as the group's leadership?
- What style of leadership is used? (provide description)
- How are decisions made?
- Describe the challenges and strengths the group faces working together

After all people have described their group, individually have the participants think about:
- What one thing made the group effective?
- What would have made it better?

Ask each person to write his/her "one thing" that made the group they chose effective on a sticky note and post it on a flip chart at the front of the room.

Ask a spokesperson from each group to describe the team discussion, answering these questions:
- Why did the groups you discussed form/ what are their missions?
- What styles of leadership did you identify in discussing your groups?

Read aloud the sticky notes describing what made groups effective. Debriefing questions might include:
- What commonalities do you see?
- What surprised you?
- Which of these item(s) on the flip chart tie(s) to working by consensus?
- Which of these items could prevent a group from working by consensus?
- What have you learned that you can apply to groups that you are in now?

Break	*(15 Minutes)*

Rating my Facilitative Leadership Behaviors
45 minutes

Materials: Handout #1 -Rating my Facilitative Leadership Behaviors, Handout #2–Appreciative Inquiry–Asking Powerful Questions, Handout #3–Facilitation from the Side of the Room Flip chart

WHY: When practicing participatory leadership, every member is responsible for contributing to the success of the group, regardless of his or her role or position. You have probably seen how one member in a group can halt progress. In the same way, one member of the group can significantly contribute to progress. Each member has the ability to facilitate from the side of the room to move a group forward. We are going to talk about some behaviors that a person can practice as an individual to become a better facilitative leader in his or her group(s). Facilitation from the side of the room has been previously introduced, but will be expanded upon in this unit.

Handout #2

HOW: Divide the group into pairs. Pairs should be encouraged to spread out, which may mean they leave the room. Using participant Handout #1 ask participants to first individually rank themselves on the behaviors and, then, to discuss with their partner two things they do especially well and two things that need improvement.

Still in pairs, discuss the questions at the bottom of Handout #1:

Record responses to "other behaviors" question on a flip chart.

- What's important to you about the results of your self-evaluation?
- What's missing from the picture of your facilitative behaviors?
- What's the next level of thinking that you need to do?

Re-gather as a large group. Debrief questions might include:

- What was different about working in pairs verses a larger group?
- Which were more helpful, the rating questions or discussion questions? Why?
- What other behaviors do you think belong on the list?

Handout #2 and Handout #3

The discussion questions are intended to be examples of appreciative inquiry (AI). AI is a concept that might interest you and there are many resources about it. For our purposes, AI questions are questions that (a) assume there is something good in the situation to build on and (b) encourage new perspectives. An appreciative inquiry question is a powerful tool for facilitating from the side of the room. Handout #2 is a resource with more questions and Handout #3 at the end has more information about how to build your own questions.

Introduction to Consensus-Building: "Small Change" Activity
30 minutes

Materials: Enough quarters for everyone to have one, Flip chart, Participant Handout #4–Consensus Decision-Making Process

WHY: In its most basic form, consensus-building requires that all members of a group are heard and are satisfied with the decision or strategy to move forward, but it doesn't guarantee that all participants get exactly what they want. As Russell Linden writes in *Working Across Boundaries*, "Consensus means everyone has input, everyone feels heard, and the group comes up with a decision that all (or most) can support." In groups, unanimous decisions cannot always be reached, so the goal is finding a solution that everyone can live with and support. This activity will help illustrate the consensus decision-making process in an enjoyable way.

HOW:

❶ Divide the participants up into groups of 5 to 10.

❷ Give each participant a quarter and give them only these simple instructions:

- Currently the money is split out amongst all your group members.
- Someone in the group will get all of the money.
- The group's job is to decide who—only one person can end up with the money. How you choose to decide is up to your group.

- You can't make a deal to split up later or to provide something to the rest of the group in exchange for the money, and you can't use a lottery approach (you can't put names in a hat and draw one).

Large Group Debrief of Activity
- How did you come to consensus?
- What challenges did you face that made the decision more difficult to reach?
- Did the process work out like you thought it would? If not, what surprised you?
- Who ended up with the money and what was your rationale?
- How did those at your table demonstrate leadership?
- Did someone facilitate the process without imposing his/her own idea of what should be the result?
- What facilitative behaviors did you observe?

Handout #4—Consensus Decision-making Process

Introduce Handout #4 Consensus Decision-Making Process and talk through the steps: Set the goal (which may also be referred to as gathering with purpose); create vision and criteria; gather information; brainstorm possibilities; evaluate and narrow choices; and make the decision.

There are places, including Quaker organizations and institutions, in which consensus-seeking is held in such high regard that groups are willing to invest a great deal of time and set aside individual egos to reach consensus–sometimes over the course of months and years.

Most groups, most of the time, place a higher value on time, and so the potential benefits of working through consensus are always being balanced with the deadline. The Consensus Decision-Making Process is a way to be sure everyone is heard and all ideas are considered even if every decision is not unanimous. Sometimes groups can use this process fairly quickly and intuitively, but the more complex the issue, the more attention should be paid to the process. Remember that the realistic goal is not that everyone wholeheartedly agrees, but rather that everyone can support the final decision and can live with it.

Then ask some follow-up questions to the large group:
- During the small change activity, did you follow any of these steps?
- How might knowing this process have been useful in reaching consensus?

Break	*(15 Minutes)*

Tools for Reaching Consensus
60 minutes

Materials: Handout #5—Tools for Reaching Consensus

WHY: There are many different tools that can be used to help groups reach decisions and ensure that all voices are heard. The purpose of this interactive teaching session is to introduce several of these tools. The activity also creates opportunity for participants to practice front of the room facilitation/teaching.

HOW: Provide the following directions.

One place in the consensus decision-making process that can leave a group embroiled in chaos is the transition from step four, brainstorming, to step five, evaluation. Whether you are at the front of the room or a participant in a group, it can be helpful to know several different methods for accomplishing these steps that allow the group to move through chaos toward unity.

There will be five groups. Each group will be tasked with using the handout to learn about one consensus-seeking activity, then creatively teaching it to the whole class. You will have 20 minutes to plan, and then each group will have 5 minutes to present.

Tools for Reaching consensus/making decisions as a group:
- List reduction
- Voting with dots
- Multi-voting
- Payoff matrix
- Nominal group process

After all groups have presented, bring the group back for large group debrief of teach-back:
- What things did you see and like in these different processes of consensus?
- Where will you use each of the consensus-seeking tools?
- How might using these tools help a group better manage chaos and move toward unity?
- How can you exercise leadership by asking questions?

Closing Circle
30 minutes

Materials: Handout #6—Vehicles for Working Together

UNIT DEBRIEFING QUESTIONS:
- What did we discuss today that will be most valuable in the groups you are already a part of?
- Where in our community do you see need for more consensus building?
- Given the realities of limited resources, we are often asked to do less with more. How can a facilitative leadership approach help accomplish that?
- What will you individually do differently to promote a facilitative or consensus-based approach in the groups you are a part of?

REVIEW THE GOALS OF THE SESSION:
Learning Objectives:
- Learn about ways groups work together
- Help the group learn to work through chaos stage to a performing community
- Gain insights about group process, consensus building, and leading from the side of the room

HOMEWORK:

❶ Review the list of facilitative behaviors and your answers to the assessment. Write a plan for yourself to improve on the behaviors that were not ranked highly.

Handout #6—Vehicles for Working Together

❷ Look at Handout #6 Vehicles for Working Together to learn more about different kinds of groups that work together. Identify two of each kind of group that exists in your community.

❸ Before the next time we meet, practice using the Appreciative Inquiry questions. Notice the different responses that you get by asking these kinds of questions.

Rating My Facilitative Leadership Behaviors

Please rate yourself on the following facilitative leadership behaviors using the rating scale listed.

Rating Scale: 1=Never, 2=Seldom, 3=Sometimes, 4=Often, 5=Almost Always

Behavior(s)	Self-Rating
Clearly Communicates	
Keeps the vision before the work group	
Keeps a solution-focus rather than a problem-focus	
Makes participants feel valued	
Treats participants as equals	
Listens well	
Encourages the sharing of ideas	
Captures ideas as they are presented	
Creates opportunities for interaction as decisions are made	
Uses facilitation tools to help the group reach consensus	
Watches out for and manages groupthink	
Speaks the language of the group	
Does not use jargon, which may exclude participants	
Creates an environment that encourages creativity	
Works to find meeting times when all participants are available	
Attends to the comfort needs of participants	
Records commitments and agreements as they are made	
Creates opportunities for accountability among participants	
Asks for feedback—How is this process working?	
Does not take self too seriously	
Has fun while avoiding sarcasm	
Uses humor to relax and build group interaction	

After rating your facilitative leadership behaviors above, write your responses to the following questions before discussing them with your partner.

What's important to you about the results of your self-evaluation?

_____

_____

_____

What's missing from the picture of your facilitative behaviors?

_____

_____

_____

What's the next level of thinking that you need to do?

_____

_____

_____

Appreciative Inquiry—Asking Powerful Questions

Appreciative Inquiry (AI) is a technique used to help people and organizations change their problem or situation by focusing on what's working and what's going right rather than focusing on just the problem itself. AI does not seek to blame people, but instead switches the situation into a solution-focused one in which alternate thinking abounds. AI is driven by the questions that people ask, and some questions are more powerful than others. The scope of the question must fit the situation at hand. Some examples of powerful questions are given below.

Questions for Focusing Attention:

- What question, if answered, could make the most difference to the future of (your situation)?
- What's important to you about (your situation) and why do you care?
- What draws you/us to this inquiry?
- What opportunities can you see in (your situation)?
- What do we know so far/still need to learn about (your situation)?
- What assumptions do we need to test or challenge here in thinking about (your situation)?

Questions for Connecting Ideas and Finding Deeper Insight:

- What's taking shape? What are you hearing underneath the variety of opinions being expressed?
- What's emerging here for you? What new connections are you making?
- What had real meaning for you from what you've heard? What surprised you?
- What's missing from this picture so far? What is it we're not seeing?
- What's been your/our major learning, insight, or discovery so far?
- What's the next level of thinking we need to do?
- If there was one thing that hasn't yet been said in order to reach a deeper level of understanding/clarity, what would that be?

Questions that Create Forward Movement:

- What would it take to create a change on this issue?
- What's possible here, and who cares? (rather than "What's wrong here, and who's responsible?")
- What needs our immediate attention going forward?
- If our success was completely guaranteed, what bold steps might we choose?
- What challenges might come our way and how might we meet them?
- What conversation, if begun today, could ripple out in a way that created new possibilities for the future (of your situation)?

Taken from Vogt, E., Brown, J., and Isaacs, D. (2003). The Art of Powerful Questions: Catalyzing Insight, Innovation, and Action.

Facilitating from the Side of the Room— expanded

The art of asking question is perhaps the most important ability for a facilitator. Questions are at the heart of good facilitation. A question inspires a response. A well-placed question provokes problem solving, creativity, and action. When you ask questions, the group will seek its own advice and not waste time rejecting your advice. When it seems there are no answers and when groups seem to be struggling and lost, an effective question can bring the group back. It is frequently the well-placed question that opens up a road block and gives the group the impetus to move ahead.

When you ask questions, not give answers, you empower the group to find its own answers. Often when you do not know the answer, someone in the group does. When answers come from the group, there is more ownership and buy-in. Questions keep you from falling into the trap of giving advice. Facilitation is not about giving advice, but about pointing out what is going on, and asking questions to open up the eyes of the group.

Facilitation from the side of the room describes a process that challenges participants to become facilitators. Leaders should be able to help any group of which they are a member by asking the right questions, making suggestions, and empowering others to contribute to the process.

Constructing and Asking Powerful Questions

An excellent tool for facilitating from the side of the room is the technique of appreciative inquiry. Appreciative inquiry can be used to form questions that will result in clear, shared vision, mission, and guiding principles for a group and encourage active listening, not just hearing.

What is a Powerful Question?

A powerful question according to Vogt, Brown, and Isaacs, generates curiosity and invites creativity, focuses inquiry, and stimulates reflective conversation. It is thought-provoking and brings to the surface underlying assumptions, touches a deeper meaning, stays with participants, and travels well, spreading around the organization. Questions will be an important part of your role as a facilitator.

The construction of a question can make a critical difference in either opening our minds or narrowing the possibilities we consider. For example, think about which questions are more powerful:

- yes/no questions
- why
- how
- what
- which
- what if
- who
- when
- where

As you move from simple yes/no questions to why to what if, the queries stimulate more reflective thinking and more creative responses.

Here are some items for consideration as you master the art and architecture of powerful questions. They are based on pioneering work with questions being done by the Public Conversations Project, a group that helps create constructive dialogue on divisive public issues.

Ask yourself:

- Is this question relevant to the real life and real work of the people who will be exploring it?
- Is this a genuine question—a question to which I/we really don't know the answer?
- What "work" do I want this question to do? That is, what kind of conversation, meanings, and feelings do I imagine this question will evoke in those who will be exploring it?
- Is this question likely to invite fresh thinking/feeling? Is it familiar enough to be recognizable and relevant and different enough to call forward a new response?
- What assumptions or beliefs are embedded in the way this question is constructed?
- Is this question likely to generate hope, imagination, engagement, creative action, and new possibilities or is it likely to increase a focus on past problems and obstacles?
- Does this question leave room for new and different questions to be raised as the initial question is explored?

* Adapted from Sallyann Roth, Public Conversations Project

Consensus Decision-Making Process

① **Set the goal.** The group needs a clear end-in-mind. The first consensus decision is to determine the end goal. Without an agreed upon goal, constructive consensus will be impossible.

② **Create a vision and spell out criteria**. That will help the group make a good decision. What is our "preferred future"? What are the indicators of a good outcome? What would it look like if we got it right? It helps to understand what is essential for the outcome to include (must haves) and what is desired but not absolutely necessary (would likes).

③ **Gather information.** What information does the team need in order to make the best decision? Who has this information, and how do we bring them to the table? Discuss driving forces (supports) and restraining forces (obstacles) before moving on to strategies.

④ **Brainstorm possible options and strategies.** Develop as many options as possible before narrowing the list of strategies. The facilitator ensures everyone understands the meaning of each strategy before moving forward.

⑤ **Evaluate the brainstormed options and strategies against the criteria.** Open and honest discussion is needed, with the facilitator protecting the rights of everyone to be heard. There are several options for completing this step:

- Discuss each strategy individually. Ask: Does the strategy meet the "must have" criteria? A decision matrix may help: List the criteria for a good decision vertically, and then list the options/strategies horizontally. How many of our "must haves" are met by each strategy?
- Use a numerical scale–Have each member assign a value of 1 to 5 to each strategy, with 5 being assigned to the strongest strategies.
- Voting–Using a limited number of sticky dots, have members vote for their top strategy (or strategies).
- When the group has narrowed the strategies down and thinks it may be close to finding a decision that is well supported by all, it may be useful to test. Use a voting scale to identify how all of the participants are individually feeling about the strategy. To do this, the facilitator asks participants to rank each strategy with the phrase that best represents their position. The voting scale* directly below will help sort out where there is already a measure of consensus and where more time needs to be spent discussing or reformulating the options:
  - Wholeheartedly agree (with the strategy)
  - Supportive
  - Can live with it
  - Reservations about it—let's talk more
  - Serious concerns exist—must talk
  - Reject it—will block it

6 **Make the decision as a team.** The facilitator checks to make sure there is full consensus before assuming everyone supports the decision. Use the bus or train analogy: The bus is leaving the station. Can you get on board? What will it take to get you on our bus?

The ABCs of consensus...
- Address the issue (Steps 1–3)
- Brainstorm all the possibilities (Step 4)
- Come to consensus (Step 5 and 6)

Tagliere, D.A. (1992). How to meet, think, and work to consensus.

Source of voting scale: Policy Consensus Initiative. A Practical Guide to Consensus, (Santa Fe, NM: 1999) p. 68.

Tools for Reaching Consensus

List Reduction

The most effective list reduction technique is to combine similar ideas into a single strategy. The facilitative leader looks for commonalities and themes and presents them to the group for feedback. The facilitator can also ask the group to identify opportunities to combine ideas into a single idea or strategy.

When a group is faced with more ideas than can be reasonably managed, the list can be reduced. Remind the group of their vision, mission, goal, or objective. Ask the group to discuss each idea and determine if the item is a "Must Have" or a "Would Like." Each item is then marked with a "MH" or a "WL." "Must Have" ideas are addressed first as the groups continues planning.

Voting

If you anticipate the group will need to prioritize ideas or strategies, leave room on flip charts for voting boxes (see below). Voting should take place after list reduction.

Strategy Option …	
Strategy Option …	
Strategy Option …	
Strategy Option …	

Give each member of the group three to five sticky dots (depending on the number of strategy options). Participants may then vote for three to five different strategies. Participants should not vote for a strategy more than once. Allow time for each person to vote and then call out the results of the process. Proceed with the ideas that received the most votes.

Multi-voting

Multi-voting builds consensus by eliminating individual ownership of specific items. For an individual item to progress to the next round of voting, it must receive a number of votes greater or equal to half the number of participants. (If there are 20 participants, a strategy must receive at least 10 votes to move on to Round 2.) In Round 1, each participant may vote on all items he/she considers important. Participants may vote for as many single items as they wish, but should only vote for items they believe are important. Participants should not vote for a strategy more than once. Items receiving enough votes are then presented back to the group.

In Round 2, each participant is allowed a total of three votes. (If there are 20 participants, a strategy must receive at least 5 votes to move on.) Once again, participants should not vote for a

strategy more than once. Items receiving enough votes are then presented back to the group.

If needed, a third round can be conducted. In this round, each participant is allowed one vote for the remaining items. When a round results in three items or less, the process is completed.

Payoff Matrix

The payoff matrix is a consensual discussion tool that works well after a multi-vote or when a limited number of options are being considered. Each option is tested against two questions arranged in a simple matrix.

- Will implementation be easy or tough? (horizontal axis)
- Will the impact be small or big? (vertical axis)

Implementation

	Easy	Tough
Small Payoff		
Big Payoff		

(vertical axis label: **Impact**)
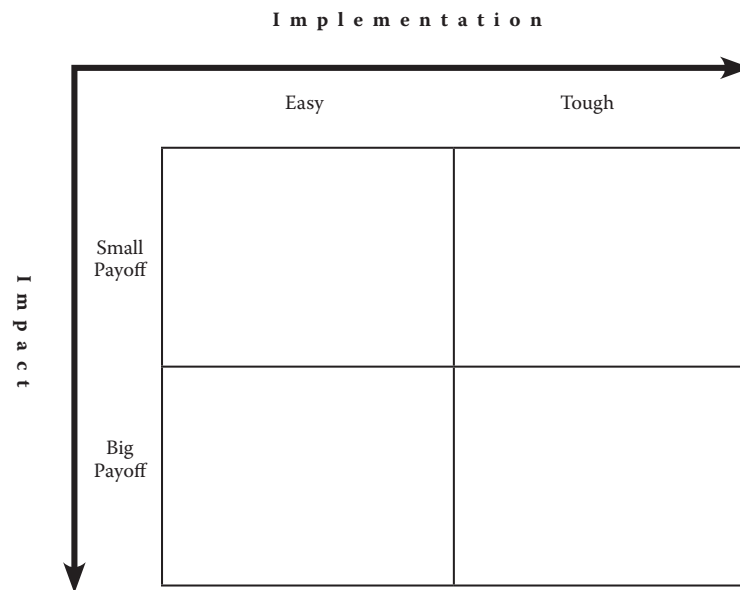
The group then discusses in which quadrant each item should be placed. The priority of action is informed by the quadrant chosen. An easy implementation with a big payoff takes a high priority. A tough implementation that is likely to yield a small payoff is a low priority.

Nominal Group Process

This process is basically a round robin method for generating ideas.

1. All ideas are posted on flip charts, participants rank the ideas silently and independently, choosing the five ideas with the most promise.
2. Participants report and discuss their rankings.
3. Another silent and independent re-ranking of ideas takes place.
4. Participants report and discuss their final rankings, and the group seeks consensus on listing the ideas in rank order.

Set the goal (which may also be referred to as gathering with purpose); create vision and criteria; gather information; brainstorm possibilities; evaluate and narrow choices; and make the decision

Adapted from R. Glenn Ray, The Facilitative Leader: Behaviors that Enable Success, 1999.

Vehicles for Working Together

Networking

Goal: more knowledge of existing activities

- Information exchange

Coalitions

Goal: meeting a defined task or joint goal

- Information exchange
- Authority retained by parties
- Some planning or discussion of roles takes place
- Regular communication among parties

Partnership

Goal: joint performance on one area or throughout organization

- Information exchange
- Authority defined by parties
- Significant planning and discussion of roles takes place
- Regular communication among parties
- Access to one another's turf and span of responsibility

Collaboration

Goal: achievement of common purpose or mission

- Information exchange
- Shared authority, risk, resources, and responsibility
- Comprehensive strategic planning
- Clear communication channels
- Alteration of current activities
- Noncompetitive environment
- Creation of new structure for operation

Unit Four Extras and Additional Materials

If you want more context ...

Additional or alternate handouts

- Unit Four Alternate Handout #1 "Small-Group Roles" may be used to explore specific roles that participants can hold in a group and to practice ways of contributing to the group's work without necessarily being in the front of the room. Divide into small groups (of 4-5 people) and ask each group to select different people to serve as facilitator, recorder, and presenter. Throughout the day, have participants change roles from activity to activity so more people have opportunities to take part in the action in different ways.

Suggested time: 15 minutes

For deeper understanding of Appreciative Inquiry:

Show *"Celebrate What's Right with the World"* video, available from the Star Thrower Company, and follow up with an Appreciative Inquiry lecturette:

- AI was first introduced as an alternative to traditional change management by David Coopererider at Case Western Reserve University. His wife, as an artist, brought the idea of the "appreciative eye" to David's attention.
- AI is driven by the questions which are asked. The planning cycle finds a strategic focus and moves from:
  - Discovery—Appreciate what is working
  - Dream—Imagine what might be
  - Design—Determine what should be
  - Destiny—Create what will be–action steps

Suggested time: 30 minutes

Further exploration of Facilitative Leadership Behaviors

Have the participants find three others to rate their facilitative leadership behaviors anonymously on separate checklists (use copies of Handout #1). These three people should know the participant they are evaluating well from work and/or other leadership environments. Have the participants average their scores and record them on their self-ranking Handout #1 from the session. (For this

activity you will need to have extra copies of Handout #1 available for participants to take with them).

Suggested time: Out of class activity.

Further exploration of asking powerful questions

Following the Rating my Facilitative Leadership Behaviors activity, spend more time discussing Appreciative Inquiry and the Art of Asking Questions. Use Participant Handouts #2 and #3 as a base for teaching about how to construct questions and when and how to use these questions. Allow participants to see the impact of asking these questions by having them relate to a personal experience they have had. Ask: *In a leadership challenge that you have recently faced, what questions could you have asked to help the group move forward? By asking this (these) question(s), how might the outcome have looked differently?*

Suggested time: 15-30 minutes

If you want to increase knowledge of/interaction with the community ...

Recreation/Athletics

To follow the sports theme for the day, invite a local successful sports team coach to come and share about the team consensus-building tactics that he or she may use. Ask the coach to share specifically about times when the team may be in chaos (when team members are gained or lost, injuries, conflicts, etc.) and what is important for all of the team members to do in order to stay together and be successful.

To debrief, ask such questions as:
- *Often a team will have a captain leading in addition to a coach; what value does the captain bring to the team as a leader that the coach cannot?*
- *In what ways can a captain exercise facilitative leadership?*
- *How do the diverse skills and positions on a team allow it to be more successful?*

Suggested time: 30 to 90 minutes

Business and Government Applications

Invite a state or United States legislator from the local area to come and talk to the group about what group consensus and decision-making looks like in the legislature. How is group consensus practiced in the legislature? What strategies/processes are used to include everyone's ideas? Ask the elected official about his or her approach to representing all constituents.

Suggested time: 30 to 90 minutes

Tour a local facility or factory (grain elevator/mill, chocolate factory, food pantry, maybe an assembly line facility, etc.) and observe how individual people work with different tasks and styles in order to together create an end product or service.

To debrief, ask such questions as:
- *What is about the structure of the facility contributes to its success, and how does teamwork play a part in the work done here?*
- *In what ways does dividing (or not dividing, depending on the type of facility) tasks/assignments make the group more effective as a whole?*
- *In what kinds of projects would it be more valuable for all members (or fewer members) to be involved in the entire process?*
- *What are some important acts of leadership that must take place in this setting in order to keep a facility running strong?*

Suggested time: 30 to 90 minutes

If you want an energetic activity ...

Team-building Olympics

If you have used the team sports theme, consider putting on a miniature team-building Olympics event. Divide the group into teams and lead them through a series of two to four fun teamwork activities such as untangling the human knot; moving a coffee can with a tennis ball balanced on top; using strings attached to a rubber band that fits around the can when stretched–so that each team member must equally pull to loosen and tighten the band on the can in order to lift and move it, etc.

To debrief, ask such questions as:
- *What was hard?*
- *What could we have done better as a team?*
- *What did group consensus look like in this setting?*
- *Were there points of chaos? How did your group move beyond these chaotic points?*
- *At what point do you think your team showed the best example of a performing community?*

Suggested time: 60 to 90 minutes

Activity: Building a Coalition for Change

WHY: Learning / Thinking / Working Styles can help a facilitative leader optimize team performance. This activity is great for any organization that needs to think about collaboration. In the twenty-first century, communities, organizations, even committees and departments within a company or organization will need to collaborate. Each group brings different resources that will help make the overall vision possible. However, the reality of our experience is that often times it is turfism that rules a collaborative effort, not true collaboration.

HOW: Divide the group into four small "communities." Each group is an individual community or village with the task of creating five simple objects. These objects are listed on a manila envelope. The envelope contains the resources the community has to complete the projects (although the facilitator can decide which envelopes will contain which supplies). Whichever community completes all tasks accurately wins. When a group completes the tasks, they are to present them to you or a designated judge. Check their work to confirm that they have completed the tasks exactly as stated. Keep the game going if they haven't succeeded. The group that successfully completes all tasks wins.

Materials Needed:
- Four manila envelopes
- Two 8½ by 11 sheets of paper
- Five folders—each of different color
- One glue stick
- One pair of scissors
- Five different colored markers
- One ruler
- Four sets of task instructions. On the front of the sealed envelope, attach task instructions for the following tasks. Create:
    - A chain with 4 links, each of a different color.
    - A yellow piece of paper 4" x 4" with a white "t" on it.
    - A red piece of paper 5" x 3" with 5 colored dots on it, arranged so that it looks like dice.
    - A paper bag puppet that looks like your favorite singer.
    - A paper airplane with colored stars on the wings.

Debrief part 1, focus on communication and assumptions. Ask questions:
- Which ideas were heard and which weren't?
- What stopped people from implementing ideas?
- Which ideas were implemented?
- Which assumptions got in the way?
- Did they all work together?
- Were all people encouraged and allowed to participate?
- Which vehicle for working together fit best?

Debrief part 2, considering the four quadrants of the Learning / Thinking / Working Styles Inventory:
- As a servant leader, how does knowledge of these four quadrants help you to promote optimal team functioning?
- What strengths from each of the four quadrants do group members bring to the table?
- With knowledge of learning styles, how can a leader facilitate optimum contributions from the group?

Another adaptation of this activity, to practice coming to consensus, would be to have each group create the following community symbols separately and then have to build a consensus about which colors, logo, and tagline would be used for all.

- A flag for the community
- A tagline and logo for the community
- A welcome sign for the community
- A new magazine for the community

Suggested time: 45 minutes

If you want to ask more questions ...

Questions to use in debriefing sessions and opening or closing circle

- What are the advantages to using consensus with groups? The barriers?
- What links are there between personal improvement in facilitative leadership behaviors and the success of a group?
- What examples can you think of that show how the right question can help a situation or a group?
- What are you learning that you don't yet know how to apply to your own work or community service?

Suggested time: 15 minutes

If you want to connect the topic to the class project(s) ...

Using Tools for Reaching Consensus for Class Project

Have the class (or class project groups) think about the next decision that is necessary to succeed with the class project. This might be what to do as project, how to divide up tasks or how to find partners. Using Handout #5 – "Tools for Reaching Consensus" ask the group to select the tool it believes will be most helpful in making the decision and use it. Report back on/debrief the progress made by using this tool with the larger group.

Suggested time: 30 minutes

Small-Group Roles

Small groups or breakout groups are a great way to ensure participation (effectiveness) and possibly work on more than one topic or strategic goal at a time (efficiency). You can help small groups be successful by clearly defining roles. Ask each group to select different people to serve as facilitator, recorder, and presenter. Provide role descriptions on handouts so participants can remember expectations. Have participants change roles from activity to activity so more people have an opportunity for leadership and so dominance by one or two small group participants can be avoided.

Facilitator

- Help keep the group on task
- Watch the time to assure that the group completes its task
- Assure that everyone is able to participate—no one is dominating, no one is excluded
- Remind people to listen as others are talking
- Encourage people to respect and use their different perspectives and views

Recorder

- Listen for key words, do not edit—use exact words or ask permission from participants to change words
- Capture the basic ideas, the essence of what was said—ask for feedback if necessary
- Write rapidly but legibly
- Write big enough (on a flip chart) that everyone can see what is being recorded—do not keep private notes
- Number each sheet, referencing the topic and/or group
- Do not worry about spelling

Presenter

- Be sure you understand what you are expected to report back to the full group
- Listen carefully
- Report key points as requested at the end of the session
- Be ready to report when it is your turn—avoid shuffling around, appearing uninformed, or asking others to fill in for you at the last minute

UNIT FIVE

Collaboration

Overview

Purpose of Unit Five

Learning Objectives:

- Understand a collaborative approach to community work
- Realize the importance of involving all people in community action

Other Purposes of the Session:

- Demonstrate how the application of Twenty-first century leadership capacities and the knowledge of group process leads to effective community action
- Understand how analyzing previous experiences allows future work to be more successful
- Practice consensus seeking skills of listening, understanding individual needs, and making decisions for the good of the whole
- Understand the barriers to community action and how Twenty-first century leadership capacities can help overcome the barriers

Unit Five integrates the capacities learned thus far for the purpose of getting work done, accomplishing a vision, and implementing a plan. As people who exercise leadership, participants must realize that building a performing team/community ultimately will yield results that matter. In the process, of course, trust is developed, positive relationships are fostered, and people are empowered, although participants are all unique. Unit Five demonstrates how all of the diverse knowledge comes together in collaboration.

Throughout Unit Five, participants will incorporate their individual leadership skills and qualities into the group's work. They will discuss real community issues and identify all stakeholders involved as they continue to practice using their collective skills to work together for positive change.

Participant Agenda

I.	Welcome and Overview	
II.	Discussion of the Collaborative Process	
	BREAK	
III.	The Collaborative Process at Work	
	BREAK	
IV.	Collaboration in Real Life	
V.	Closing Circle	

Collaboration

Learning Objectives:

- Understand the collaborative approach to community work
- Realize the importance of involving all people in community action

Other Purposes of The Session:

- Demonstrate how the application of twenty-first century leadership capacities and the knowledge of group process leads to effective community action
- Understand how analyzing previous experiences allows future work to be more successful
- Practice consensus-seeking skills of listening, understanding individual needs, and making decisions for the good of the whole
- Understand the barriers to community action and how twenty-first century leadership capacities can help overcome the barriers

Questions to be Addressed:

- What are the obstacles to effective community action?
- What is the power of the collaborative approach? What constitutes real collaboration?
- How do we use twenty-first century capacities to encourage diverse participation in community work and to prevent the alienation that often occurs in communities?
- Why is it important to ensure that all people, perspectives, and experiences are included in the work of an effective community?
- How do we sustain momentum in community/group work?

Unit Five integrates the capacities learned thus far for the purpose of getting work done—accomplishing a vision and implementing a plan. Forming and articulating a shared vision moves a group to the Unity Stage in the Steps to a Performing Community. As leaders we must realize that we build a performing team/community ultimately to accomplish results that matter. In the process, of course, we develop trust and positive relationships, empower people, and enhance confidence. Accomplishing things in today's complex world requires the talents and efforts of a diverse group. No one of us has all of the answers or all of the resources. This unit demonstrates how all of this knowledge comes together. This curriculum began with knowledge of the self and has moved to knowledge of group dynamics and group processes.

Background for Lead Facilitator

Just what is a collaboration? David Chrislip, co-author of *Collaborative Leadership: Citizens and Civic Leaders Can Make a Difference*, defines The Collaborative Premise: "If you bring the appropriate people together, in constructive processes, with good information, they will create authentic visions and strategies for addressing the shared concern of their organizations and communities." In today's communities, the complexity of our modern life coupled with our growing diversity means that we need a framework for problem solving that recognizes all sides and needs. During Unit Five, participants will learn the specifics of collaboration and its value to community work.

The purpose, agenda and facilitation techniques in this 5th session will be determined by the growing sophistication of the group. By now, the participants are eager to talk about their experiences and they hunger for ways to connect what they are learning to the real life of the community. It is important to use exercises based on real-life examples and issues. Also, the group should trust each other enough so that they can reveal more about their situations and can ask tough questions. This session's agenda allows more time for discussion. Remember, that even though this is the fifth session, it has been a while since the group was together and they will need time to reconnect gather, and catch up with one another.

Collaboration—Learning to Work Together

In Unit Three, we focused on the process of developing a shared vision for the community, noting that a shared vision creates hope, energy and motivation. A shared vision helps people identify their common values and dreams. Again in Unit Four the participants looked at the types of vehicles that community groups and citizens use to work together. In other words, how they organize themselves for action. We want to go deeper in Unit Five. Vision is only the first step to community improvement. If we want to improve a community, there must be action toward that vision. The capacities that we have learned throughout the program, when used in a collaborative manner, will lead to effective action. Unfortunately, in many communities, efforts that are labeled collaborations are merely community discussions at best.

To initiate a collaborative process you must:

- Identify the purpose of the process.
- Complete a survey of all community efforts that might be related to this purpose.
- Identify all stakeholders.
- Design a constructive process for engaging the stakeholders.
- Identify the information and education needs of the stakeholders.
- Identify and secure the resources needed to support the process.
- Recruit and invite the stakeholders.

Stages of Collaboration:

- Bring People Together: have an initiator, choose potential members, invite participation, and take time to get to know one another.
- Enhance Trust: choose a convener, hold effective meetings, and involve everyone in the meetings.

- Confirm our Vision: understand the vision statements and capture a focus.
- Specify Desired Results: define desired results, think strategically, and take strategic action.

Adapted from Chrislip and Larson, Collaborative Leadership.

The twenty-first century leadership capacities learned throughout this curriculum are the tools and processes needed to move a group through the stages of collaboration. During Unit Four, the participants were introduced to consensus. In the collaborative process, an individual's attitude and participation must be consensus seeking. Be sure to remind the participants of their responsibility for achieving consensus as presented in Unit Four. Remind participants that consensus does not mean total agreement but is a process that allows a group to move forward with some general agreement.

The Learning Cycle

Why is the Learning Cycle one of the basic capacities for twenty-first century leaders?

The Learning Cycle. It is a purposeful process that uses the skills of each learning style while allowing people to reflect on and generalize from their experiences. As a twenty-first century leader, you can use this cycle formally through facilitated discussion or informally through facilitating from anywhere in the room by using guiding questions.

The Learning Cycle is also the process by which we really learn new behaviors, attitudes, and actions. As we learn we naturally like to build on successes and discard our mistakes. This cycle helps us focus on our successes. Review Handout 3 from Unit One for a refresher.

In the mid '70s David Kolb formalized a highly effective way of thinking about how we learn from experience. He described this as a cycle with four stages:

1. Planning and preparing

Identifying a gap between our present state and our desired state represents a need
Planning some activity and identifying the resources required to meet that need
Specifying the criteria and evidence that will let us know it is being met

2. Action

Engaging in the activity

3. Reflection

Reflecting on that experience and gathering information

4. Concluding

Generalizing and internalizing what happened on that experience
Comparing our present state and desired state using the evidential criteria, and using these conclusions to carry on to a further stage of preparing and planning

Using the Learning Cycle

The Learning Cycle begins with a concrete experience. We then reflect and consider its importance and meaning. In the process of examining the experience, we pull out special lessons and concepts. Next we remove those lessons from the context where we first encountered them and apply them to new situations. As we try out what we have learned, we come back to the concrete experience step. We are ready to reflect again, and pull out more insights. One phase leads to the next. It is a spiral that keeps going and going and going. This cycle is a tool for personal growth and development, not only for this leadership training but in other places as well.

As we focus on collaboration in this unit, the learning cycle becomes an even more important tool. Reflections and lessons learned will vary among participants with different backgrounds. These diverse perspectives create a fuller understanding of the issue, which can help generate more effective options for its resolution.

Begin by asking your participants to think of a significant learning experience—a time when they really learned something—in a class, a workshop, some formal learning opportunity. Ask them to bring it to mind then recreate it in all its details. Was it "hands-on"? Did they practice? Did they have a mentor? Now have them write their thoughts and pull out the insights. What did they learn from the experience? Finally, have them identify what they want to remember about the learning. What do they want to keep in mind as they plan their project?

Often facilitators and trainers talk about an experiential learning opportunity when what they mean is that the participants engaged in a hands-on activity. This is not true learning. The experience is only the beginning of the Learning Cycle. The other parts of the process must be completed for significant learning and change to take place.

The steps from reflection through application are called debriefing. The general rule for debriefing is that it should take as long as the initial experience did. This is very difficult for beginning facilitators to remember. However, if you want the experience to change behaviors or attitudes, you must provide ample time for participants to process and apply what surfaces during the debriefing. The insights that come from our reflections help us learn and grow as individuals and as groups. Within any facilitation situation, you will be promoting learning and growth on two levels for the individuals within the group and the group as a whole. You must allow time for reflecting from both perspectives. As we have said, experience by itself is not enlightening nor is it educational. What makes an experience positive and rich is the meaning we assign to it. To give meaning to an experience we must pause, reflect, and think about it.

Reflecting on Experience

The word "debriefing" describes the discussion that occurs after an experience or activity. This is a way to have the group explore its common experience in a thoughtful, deliberate way using the Learning Cycle described earlier in this section. To learn from our experiences, we must pull out lessons that we can apply as we grow and change. We must reflect on these experiences in an intentional way, looking at the actions and the results.

Collaboration

Learning Objectives:

- Understand a collaborative approach to community work
- Realize the importance of involving all people in community action

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Other Purposes of the Session:

- Demonstrate how the application of Twenty-first century leadership capacities and the knowledge of group process leads to effective community action
- Understand how analyzing previous experiences allows future work to be more successful
- Practice consensus-seeking skills of listening, understanding individual needs, and making decisions for the good of the whole
- Understand the barriers to community action and how Twenty-first century leadership capacities can help overcome the barriers

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Before the Meeting (facilitation supplies and materials needed):

Team Facilitation—Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Wall Charts

- (Optional) Servant Leadership Wall (brought from previous session)
- Tool Box updated with capacities to date
- Steps to a Performing Community
- Collaborative Premise
  "Combining the appropriate group of stakeholders, with good information in a credible, open process will create shared visions and joint strategies for addressing shared concerns of the community or organization." —David Chrislip
- Others as appropriate

Premade Flip charts

- Write instructions on a flip chart for activity as people enter the room
- Post a blank flip chart page for activity as people enter the room
- Write the definition of collaboration
- Prepare quotes for the walls (see suggested list)

Handouts

- Participant Overview
- Participant Agenda
- Participant Handout #1 Better Together: Restoring the American Community
- Participant Handout #2 Collaborative Premise Checklist
- Participant Handout #3 Stages of Collaboration
- Participant Handout #4 Building a Stakeholder Inventory

Supplies

- Flip chart for front of the room
- Non-permanent markers–on tables
- Colored paper/notepaper for squiggly line activity—photocopied in advance
- One mini-flip chart for each small group
- Theme materials—puzzle pieces

Creating the environment

Suggested Theme

Putting the puzzle together is a good theme. Use lots of puzzle pieces, illustrating that for communities to work you need to have all the pieces and put the pieces together for success. The tables will need markers and an appropriate quote. If you use a theme, be sure to discuss it briefly with the class members. What symbolism do they see in the theme elements?

Room Set-Up

Round tables for 4-6 people

Session Script

Session Overview

Welcome and Overview	30 minutes
Discussion of the Collaborative Process	45 minutes
Break	**15 minutes**
The Collaborative Process at Work	45 minutes
Break	**15 minutes**
Collaboration in Real Life	1 hour 45 minutes
Closing Circle	30 minutes
Total Time	**4 hours 45 minutes**

As People Enter
30 minutes

Materials: Large flip chart pages, markers. Premade flip chart: Instructions for teams. (As timesaver, you could have premade flip charts with team members' names.)

VISION WALL
Have each team put team project and names of team members on a large sheet and hang on wall. (Alternative for class not doing team projects: Write down your name and one or more ongoing collaborations of which you are a part.)

Welcome and Overview
30 minutes

Materials: Chairs in circle; flip chart and markers, overview, participant agenda

Review capacities learned to this point. Discuss experiences of people who used last session's material in their work.

Suggested questions:
- What did you think about since the last session?
- How did you apply your new skills?
- Where and how did you facilitate from the side of the room?
- Thinking of the collaborations you put on the wall, how do groups you're part of make decisions?

- How have you (or could you) introduce(d) more consensus-building techniques?
- How are you developing your role on the teams of which you are a part?
- Is chaos becoming easier for you to manage?
- How did you use your Twenty-first century leadership capacities during your project team meetings?

Say: *As you move out of the circle, please sit with a new group of people—at least 4 to a table. As always, take responsibility for mixing the group in new ways.*

Discussion of the Collaborative Process: Who's at the table?
45 minutes

Materials: Four squiggly lines, each drawn on a separate piece of paper. Each design should be photocopied onto one color (e.g., all of squiggle A on yellow paper). One piece of paper per person. Markers for each table.

WHY: To practice creativity in problem-solving and viewing a situation from more than one perspective.

HOW:

Say: *We're going to do an activity that requires a little bit of creativity, because we think there are some unique ideas in this group that are yearning to break free. There will be no right or wrong answers.*

Remember that creativity is an essential element in problem-solving, so even if you don't think of yourself as "artistic," you can be plenty "creative."

The good news is you don't have to get stuck on those old anxieties about not being able to draw a straight line, because we've already drawn the lines for you—and they're going to be squiggly.

- Distribute a squiggly sheet to each person. Make sure each table has all of the colors.
- *Look carefully at the line on the paper. Create the best picture you can using the line as the beginning. You will have 10-15 minutes to complete your drawing.*
- Suggested coaching: *Try not to use your first idea, but dig deeper for a more creative, innovative picture.*
- After time is up, ask participants to explain their pictures to others at their tables. About 10 minutes to share at tables.
- *Please move into groups based on the color of your sheet. Share your picture with others at your table.* About 10 minutes to share.
- (Depending on the size of the group, the following questions can be just a table discussion OR can be asked one at a time and discussed in small groups with large-group callouts.) Suggested questions for table discussion (20 minutes):
  ◦ Who had similar pictures or themes? What does this say about people working together?
  ◦ Who had a unique idea? How can groups be sure that "unusual" ideas or voices are included?
  ◦ Why does it matter that we engage all people (more people?) in community issues?

Handout #1—Better Together: Restoring the American Community

• Pass out Handout #1—Better Together as (optional) follow-up reading. Explain a brief definition of social capital. *Social capital is the networks and relationships that can get things done. Social capital is one way to understand the results of effective collaborations and the reasons why stronger communities include more people.*

When you come back from the break, please sit with a new small group.

Break	*(15 Minutes)*

The Collaborative Process at Work: Learning from Our Experience
45 minutes

Materials: Flip chart; Non-permanent markers

WHY: Say: *In most communities, examples of successful and not so successful collaborations abound. We are going to look at the lessons learned from these collaborations which can lead to a more thorough understanding of the new approaches needed for getting work done in a community.*

HOW:
Have the class move to new small groups if they have not already done so. Talk about the following Winer & Ray definition and elements of a collaboration:

Definition of collaboration on a premade flip chart

Collaboration: "A mutually beneficial and well-defined relationship entered into by two or more entities to achieve results they are more likely to achieve together than alone."
   —Michael Winer and Karen Ray, (*Amherst H. Wilder Foundation Collaboration Handbook: Creating, Sustaining and Enjoying the Journey*)

Collaboration might take many forms, depending on the level of formality, such as work team, coalition, strategic partnership, or strategic alliance. Are there other terms we use to define collaborative groups?

Key elements of collaboration that are important:
- mutually beneficial—needs to be a "win-win"
- well-defined relationship—lots more productive when there are congruent expectations in terms of roles, guiding values and especially the end-in-mind or vision for the collaborative
- multiple entities—recognizes the value of different perspectives and the importance of allowing for those differences
- results more likely to achieve together—Collaboration is work in and of itself. The whole needs to be (potentially) greater than the sum of the parts

Say: *Looking at your community, identify a project or collaboration that is working and one that seems to be struggling. They may be in the whole community or in an organization.*

Handout #2: Collaborative Premise Checklist

- Distribute Handout #2 Collaborative Premise Checklist. *This is a tool that can be used to diagnose the strengths and challenges of a collaborative effort.*
- *In your small group, analyze why these community collaborations may or may not be working. Remember that sensitive information shared during this discussion should remain confidential.*
- *Consider:*
  ◦ The Collaborative Premise,
  ◦ Your knowledge of Twenty-first century capacities
  ◦ Your understanding of group work
  ◦ The Wall Chart of capacities we've been building

- Large-group call out:
  ◦ What appears to be important for collaborative action?
  ◦ What are the barriers to effective collaboration?

- Alternate activities to large group call out:
  ◦ Identify the most obvious challenges in the collaboration you're discussing and how you can address them
  ◦ Write a plan of action

Break	*(15 Minutes)*

Collaboration in Real Life: Implementing Change
1 hour 30 minutes

Materials: Mini-flip charts or several flip chart pages for each small group, markers for each group

WHY: To give participants a chance to see how collaborative principals and techniques apply to actual community issues.

HOW:
- Discuss a real community issue in small groups.
- Pick a community issue that would generate discussion and fresh ideas. This discussion could happen over a break or during lunch.

For the remaining part of the session, we will take a real community issue and design and present a collaborative process for the issue.

SUGGESTED ISSUES:
- An issue related to participants' project groups
- Smoking ban in public places
- Expansion or reduction of public transportation
- Economic development vs. environmental sustainability
- Apathy among young people
- Is it time to designate a State Secretary of Education?
- City management: a manager or a city council?

- Legislators' pay: should it increase or decrease?
- Or choose your own!

Take a few minutes to discuss the issue in your group.

Handout #3 Stages of Collaboration

- Distribute Handout #3 Stages of Collaboration. *These are the stages of collaboration we will design for this exercise.*
- Distribute Handout #4. *Use this chart to identify stakeholders to this issue.* (10 mins)

Handout #4 Building a Stakeholder Inventory

- *Identify some of the possible responses community members could have to this issue.* (10 mins)
- *Describe the processes that will be used to bring people together.* (10 mins)
- *How will they sustain momentum?* (10 mins)

In the last 30 minutes, the groups will present their process to the entire class. Creativity is encouraged.

The class will evaluate the process and make suggestions for improvement. Consider the questions:

- Are there other options you considered?
- Have all the stakeholders been identified?

Closing Circle
30 minutes

Materials: Chairs in circle; flip chart and markers

As in all units, the closing circle is a valuable time. It allows participants to pull all of their thoughts together. Ask:

- *Now that you have experienced and thought about collaboration, what are your thoughts?*
- *Some people say 70% of collaboration is creating a safe space for people and their visions, and the rest is about relationships and follow-through. What do you think about that?*
- *Think about the times you have chosen not to collaborate. How might you approach these situations now?*
- *What are reasons to collaborate? What are reasons not to collaborate?*
- *When collaboration does not go as expected, how can you adjust to the situation?*
- *How might you use this information?*
- *How might this information help your project group's work?*
- *What is the key learning you have had today?*
- *How do you understand a collaborative approach to community work?*
- *What are reasons for involving all people in community action?*

HOMEWORK

- Working with your project group, think about how you might use collaboration to improve your project.
- Complete a stakeholder map related to your project or a community issue you care about.

Better Together, Restoring the American Community

Using Social Capital to Build Effective Communities and Create Change

- Effective communities need physical capital (tools and resources), human capital (education), and social capital (the networks and relationships that can get things done).

- Social capital must be built within like groups and among diverse groups. Both kinds are needed to make change in a community.

- Social capital is all about building trust and relationships. It takes time and effort and only develops through extensive face-to-face conversations.

- Stories build connections. Telling and listening to each other's stories creates empathy among the group and helps people find things they have in common.

- In bringing diverse groups together, storytelling can build the necessary social capital. Stories uncover unifying themes and commonalities—reasons for the different perspectives to work together.

- In building trust, it is important to promote genuine participation and shared power. Leadership must be developed from within.

- Once you build social capital, the energy and relationships can be reused to resolve other issues that come up.

- Real social change takes time—lots of it. Building social capital is ongoing and never-ending.

- The key to social change is the successful completion and celebration of small victories along the way to a larger goal.

- Common spaces where people meet, discuss, and celebrate are vital.

Adapted from Better Together by Robert Putnam and Lewis Feldstein

Collaborative Premise Checklist

Set Up for Success

- Be inclusive by identifying and convening all stakeholders.
- Be open-minded and willing to reconsider your position.
- Identify the real problem by searching for root causes.
- Agree on processes for working together.
- Gather information that reflects all concerns.

Work Together

- Build relationships and the capacity to work together.
- Practice listening and engaging others in dialogue.
- Share all information with all stakeholders.
- Understand the information.
- Analyze information: strengths, weaknesses, opportunities, barriers.
- Use collaborative problem solving, visioning, and strategic thinking to decide what needs to be done.

Move to Action

- Reach out constantly to build a broader constituency.
- Nurture relationships.
- Celebrate ongoing successes!!!

Stages of Collaboration

Bring People Together

- Have an initiator
- Choose potential members
- Invite participation
- Take time to connect

Enhance Trust

- Choose a convener
- Hold effective meetings
- Involve everyone in meeting

Confirm Vision

- Analyze vision statements
- Select a focus

Specify Desired Results

- Define desired results
- Think and act strategically

Building a Community Stakeholder Inventory

Individual, Group or Organization that Could Help	Self or Organizational Interests	Assets They Can Bring

Adapted from Michael Winer and Karen Ray, Collaboration Handbook: Creating, Sustaining and Enjoying the Journey (St. Paul, MN: Amherst H. Wilder Foundation, 1994), p. 148.

Unit Five Extras and Additional Materials

If you want more context ...

Additional or alternate handouts

Unit Five Alternatives Handout #1 A High-Achieving Community describes skills and characteristics of successful communities. This may be useful context for the class before or after "Collaboration in Real Life." The handout is found behind this section.

Suggested time: Out of class activity

Lecturette: Connecting Other Capacities to Collaboration

Consider saying something like this to connect the concepts of previous sessions—especially vision—to the introduction of collaboration:

To implement a vision, we have come to believe that the collaborative process has the most potential for success. Collaboration as a process utilizes all of the Twenty-first Century capacities that have been included in this curriculum. Therefore, it will be important for you to understand the reality of collaboration. Collaboration has become a buzz word in many communities, but often the efforts described as collaboration are just groups discussing issues, not really working together to create better solutions.

As you move out into the community to make a difference, you will have opportunities for collaborative efforts. If you seek funds or grants to support your work, this will likely come up whether you introduce it or not, as many funding organizations direct applicants to create collaborations in order to receive funds.

Suggested time: 5 minutes

Lecturette: Elements of Collaboration

Key elements that are important:
- Mutually beneficial—needs to be a "win-win" situation
- Well-defined relationship—more productive when there are congruent expectations in terms of roles, guiding values and especially the end-in-mind or vision for the collaboration

- Multiple entities—recognizes the value of different perspectives and the importance of allowing for those differences.
- Results—likely to achieve more together. Collaboration is work in and of itself. In order for it to be worthwhile, collaboration needs to result in greater benefits than those costs of collaboration. If not, it doesn't make much sense to do it! The whole needs to be greater than the sum of the parts.

Why Collaborate? As Martin Luther King Jr. put it, *"We are caught in an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly!"*

That is we are all impacted by what each of us does!

Why NOT Collaborate? Most times most participants collaborate because there is a "win" for their organization. Sometimes participants will collaborate because the "win" for the community or those they serve is critical.

- Collaboration seems to work best when most participants/organizations have something to give and something to gain.
- Be aware of the myth that one always has to collaborate and that collaboration is the only way.

Successful collaboration summed up: 70% safe space for all involved; and they are joined by a shared vision; the rest is about relationships and follow-through on action!

Suggested time: 10 minutes

Lecturette: Factors That Make or Break a Collaboration

Facilitators may wish to develop in advance their own examples of these factors. Encourage discussion about how class members have seen these or other factors at work in the community.

- **Ideology**—core values—It's important to be conscious of your own values and provide space in the negotiation phase to explore relevant values of partners. Disagreement on a fundamental issue can be the ruin of the collaboration if not openly addressed and if groups do not at least agree to disagree.

- **Leadership**—Provide as well as cultivate new leadership

- **Power**—Power is rarely equal among members of a collaborative; still it is important to equally value different groups and individuals and to make intentional efforts to share power. The collaborative leader is willing to share or even defer the power to the group

- **History**—Past failed efforts or "bad blood" between members should not be avoided, and it is often best to acknowledge and address it, otherwise it could become an insidious force working against the collaborative

- **Competition & Turf**—It's important to acknowledge and encourage self-interests being served when they don't violate the self-interests of others.

- **Resources**—Include what each partner brings to the table as well as what is available through the collective collaborative effort.

- **Conflict**—Some often believe that conflict is, by definition, a precursor to failure, but in fact, if there is no conflict, then parties may not be truly bringing their unique perspective and value to the table!

- **Results**—It's important to balance planning with action.

- **Access**—It's important for the collaboration to proactively reach out to relevant stakeholders and to make sure access to involvement is possible/easy.

Suggested time: 15 minutes

If you want to increase knowledge of/interaction with the community ...

The Arts

The performing arts can lend themselves to the collaboration theme with a little care. Try to emphasize music that is highly improvisational or collaborative (the Paul Winter Consort, Phish, Herbie Hancock's *Possibilities* or a great deal of jazz, for instance) vs. music that is highly dependent on a conductor.

Ask questions such as:
- What are the pros and cons of having a conductor? What does this suggest about collaboration?
- What makes it possible for each player to contribute?

Suggested time: time may vary

Similarly, theater could be used as a theme (think: *All the World's a Stage*). Consider all the design and performance elements that go into a play and how they have to be adjusted through a rehearsal and building process to support a common vision. Have a local actor, director or teacher lead improvisational theatre games, emphasizing the "yes, and" approach to improvisational performance.

Ask such questions as:
- How can the director, without abdicating his or her authority, help achieve the collaboration needed for a production? What does this suggest about collaboration?
- What's it like for those in the theater who get less recognition?

Use these themes to emphasize the performing arts in your community. Tour performance spaces and observe mini-performances or panel discussions by local performers or teachers.

Suggested time: time may vary

Business and Government Applications

Invite co-owners of a small business to talk about their partnership. What made them decide to work together? What makes it difficult? What are the rewards? What strategies do they use to make the most of each partner's talents?

Suggested time: 30 to 90 minutes

Invite a project leader of a larger company to speak to the class. How does the leader balance authority with cultivating collaboration? How does he or she choose people to be on a project? What are the ways he or she sees team members having difficulty working together? What strategies does the team use to overcome these difficulties? When was a time it went very well?

Suggested time: 30 to 90 minutes

Tour a government agency or function that is run cooperatively by more than one agency or municipality (dispatch center, recycling center, solid waste station/landfill). What went into forming the partnership? How is the partnership maintained? What are the taxpayer implications? Who intervenes when something goes wrong? What other government functions have potential for collaborative solutions?

Suggested time: 30 to 90 minutes

If you want to practice a related capacity …

Related Capacities: Using the Learning Cycle to Address a Barrier to Community Work

This activity can allow the participants to concretely practice the experiential learning cycle.

WHY: Too often we are involved in a project but when it is finished we stop before asking: "What did we learn?" and "How can we do it better in the future?" The Learning Cycle gives us a process to learn from experiences and constantly improve because of our learning.

One of the barriers that is mentioned in many community contexts is the ability to attract and retain volunteers during any project. We will use the Learning Cycle to help think about the most effective ways to recruit volunteers. This process, while important to our discussion of getting work done in the community, is also an important leadership capacity that has many applications in community work.

Emphasize the simple steps:
- Recall an experience
- Discuss/talk about the experience
- Draw insights and learning from the experience
- Determine how you will apply this knowledge the next time

To start the process:
- Have each person think of a volunteer experience he or she truly enjoyed.
- In small groups of four or five, have each person share about the experience with the others.
- Each small group will make a list of the general themes that they heard in these stories.
- From these themes, each group can put together an effective plan to recruit and retain volunteers. Share these designs with the entire group so that everyone will have several ideas for getting volunteers.

Summarize this section by reviewing the Learning Cycle and giving several other examples of how it can be used in community work to determine effective next steps. Ideas for examples might include assessments of local visioning processes or efforts to change something. Ask participants to suggest examples from their experience.

Suggested time: 30 minutes

If you want an energetic activity …

Unit Five can be a good time to introduce a learning opportunity such as these handouts/exercises:
- Unit Five Alternatives Handout #2 Tablecloth / Magic Carpet
- Unit Five Alternatives Handout #3 Puzzle Exercise
- Unit Five Alternatives Handout #4 Labyrinth Activity
- Unit Five Alternatives Handout #5 Puzzle Collaboration

In each of these exercises, collaboration is the most expedient choice. Activity instructions may be found in the handouts at the end of this section.

Debrief these activities with such questions as:
- What was it like to realize you didn't have all the resources you needed at the team level?
- Who made the first move toward cooperating with another group?
- What made it difficult to work together?
- How did you celebrate your success?
- Was this collaboration? Or was it mutually beneficial cooperation? To you, what's the difference?

Suggested time with debrief: 45 to 60 minutes

Pop-Up Questions

These could work well inserted at the beginning of "The Collaborative Process at Work." Participants should stand (pop-up) if their answer is yes. Ask:

- *Who has been a member of a collaborative effort or coalition…*
  - *More than once?*
  - *More than 5 times?*
  - *More than 10 times?*

- *A great deal of experience in the room and your experiences and stories will be helpful today. Let's hear just a few examples: (five to eight)*
- *Who here considers yourself an EXPERT on collaboration?*
- *Even though there is a great deal of experience in the room most people, even veteran coalition participants, resist in calling themselves experts. Why?*
  - *Every time it is different*
  - *Every time the individuals are different or at least some are different*
  - *Ask participants for other reasons why no one stood up.*
- *Who here is a native of our community or has lived in our community a long time?*
- *Who has done collaborative work in other places?*

We need everybody, and while there are advantages to having lived in a community for a long time, there are also advantages to being new to a community or collaborative. This is also a special place for this kind of work, as coalitions seem to be so plentiful.
- *Who believes collaboration is an "unnatural act"? Who believes collaboration is basic to our "human nature"?*
- *It is both, fortunately or unfortunately*

Sometimes it's hard to share and cooperate with organizations with whom we are competing (or have in the past), but it is a way to get some things done and it is what sets us apart as a species. Collaboration creates ownership. Community organizers say if you have to market your idea to someone after the fact, they should have been part of the process from the start.

If you want to ask more questions …

- What are the obstacles to effective community action?
- What is the power of the collaborative approach? What constitutes real collaboration?
- How do we use Twenty-first century capacities to encourage diverse participation in community work and to prevent the alienation that often occurs in communities?
- Why is it important to ensure that all people perspectives and experiences are included in the work of an effective community?
- How do we sustain momentum in community/group work?

Suggested time: 10 minutes

If you want to connect the topic to the class project(s) …

Use "The Collaborative Premise" to evaluate whether your project is including the right stakeholders with appropriate information.

Suggested time: 10 minutes

A High-Achieving Community

A High Achieving Community:

- Has a strong public life
- Experiments in the face of uncertainty
- Makes needed changes
- Exercises good judgment

Application

- How can this knowledge be applied?
- What does this mean to me?
- What will I do differently?
- How can I adapt this learning for my situation?

Process (Sharing, Comparing, Reflecting)

- What did we see?
- What did we do?
- How does this connect to our lives?
- What did we learn?
- What do the experts say?

Based on work by David Kolb and the work of Contemporary Consulting.

Tablecloth / Magic Carpet

Background

The tablecloth activity can be used to teach change, out-of-the-box thinking, team building, and/or communication. It is a very versatile activity. The activity's outcome depends on how it is debriefed and processed. Since it is a physical activity it is a good way to energize a group.

Appropriate Quotes

Consider intruducing this activity using the following quotes or others of your choosing:

"MAGIC CARPET" by Shel Silverstein from *A Light in the Attic*

> You have a magic carpet
> That will whiz you through the air,
> To Spain or Maine or Africa
> If you just tell it where.
> So will you let it take you
> Where you've never been before
> Or will you buy some drapes to match
> And use it
> On your
> Floor?

"To me, the simplest definition of leadership is the ability to produce change."
> –Peter Senge

"The detour, of course, became the actual path."
> –Gretel Ehrlich

"Still around the corner there may wait, a new road, or a secret gate."
> –J. R. R. Tolkien

"Nothing endures but change."
> –Heraclitus

Supplies

Flannel-backed vinyl tablecloths based on the number of people in the group.
- 70 x 52 for 10–11 people
- 52 x 52 for 8–9 people

Place the tablecloths far enough apart so it doesn't look like they can cooperate but close enough so that they might figure out how to work together.

Introduction

1. Talk about the changing world. We must all learn to accept change and work effectively in an ever-changing society.
2. Tell the group to imagine they are on a magic carpet flying through the sky. Your tablecloth is the magic carpet. Stepping off onto the floor mean you have fallen to the earth. You are heading in one direction but, as in our changing world, situations change and, consequently, we have to change direction and head elsewhere.
3. The task is to turn the tablecloth over without falling to the earth. Remind the group to be careful. They must keep their toes and heels on the magic carpet.
4. Then say *when you are all finished turn and face us.* Don't give them anymore instruction or rules. Just these basic ones.

Processing

1. When a group finishes and they turn around to face you, ask them: Are you all finished?
2. When everyone is finished or you have decided it is time to debrief, have people stay where they are for a short discussion
3. We always ask first: How did it work? What did you learn?
4. They are usually quite thorough about the need to listen, work together and use everyone's gifts and talents.
5. One point they sometimes miss is the important point of cooperation between cloths. We talk about how in, communities, the whole community is not truly working if only one neighborhood is working well. If there is a problem in any neighborhood then the community has a problem. It is the same for any organization (for-profit or not-for-profit). If the young women's group in a congregation is not working well, then the congregation as a whole is not working well. If the shipping department is not working well, then the whole company is not working well.
6. We explain that we learned this process from the Saturn Car Company trainers. Saturn works through consensus decision making and uses this activity to help people learn to listen to one another and to use everyone's gifts and talents and to see the importance of cross-departmental communication. We sometimes share this information at the beginning of the process if we know there are some skeptics or some people who aren't as comfortable with exercises. This information gives credibility to the activity.
7. If there are participants who are physically unable to participate (truly, truly unable—we have been surprised by how many whom we might think are unable but really are able) we assign them as coaches.

Mary Jo Clark, Pat Heiny

Puzzle Exercise

Background

The puzzle exercise is used to teach team building and/or the importance of collaboration. It involves moving around the room, so it also helps give people a break from sitting.

Supplies

You will need puzzles with large pieces- around 64 pieces each. It helps if the puzzles are in the same family- for example, all animals, all similar cartoon characters. You'll need one fewer puzzle than you have tables of people (e.g. If you have five tables or groups of people, use four puzzles.)

Prior Planning

Determine how many groups you'll have and then use the appropriate number of puzzles. Mix all puzzle pieces together put an equal number of pieces in baggies.

Introduction and Directions

Keep the directions very simple—little or no explanation. Give a baggie of puzzles pieces to each group. Tell them to put the puzzle together.

Debriefing

Hopefully participants will figure out that they need other people to get the job done—that they need cooperation, teamwork, and consensus. How does this reflect what happens in their community? Ask how they realized they needed to work with other groups for the information they needed. You can talk about collaboration and finding who has the information they need. You can also talk about the different roles people take in a group—who takes the lead, who watches, who coaches, and who cheers. You can also ask how individuals felt who didn't take an active role. Talk also about their personal attitude toward collaboration and about giving up control (pieces of their puzzle). Personal attitude and giving up control are at the root of most issues in collaborative efforts, so this is a great discussion starter.

Adapted from work by: Mary Jo Clark, Pat Heiny

Labyrinth Activity

Ends-in-Mind

- Understand the intricacies of working collaboratively with multiple individuals, organizations, and systems
- Become more aware of the dynamics involved in working together to an effective end
- Gain appreciation for each other as partners and team members committed to a specific cause
- Recognize the importance of all forms of communication to get tasks completed

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Time Needed

- Instructions: 5 minutes
- Group strategy discussion: 3–5 minutes
- Activity: 15 minutes
- Processing with the large group: 20 minutes

Materials Needed

- Masking or duct tape
- Facilitator will need to make a key for the correct path (on paper) before the activity begins

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Facilitator Instructions

1. On the floor, create a maze using masking or duct tape at least 5 feet x 6 feet (rows/columns). EACH BLOCK MUST BE UNIFORM IN SIZE/SHAPE. See the example maze on the following page.
2. Instruct participants that this is a group exercise. The object of the labyrinth is to follow a hidden path from the beginning to the end by moving through blocks.
3. Only one person is allowed to be on the labyrinth at a time. Each group alternates turns on the labyrinth.
4. There is no talking at all after the exercise begins. NO TALKING!
5. Groups are allowed 3–5 minutes to discuss how they will move from the front of the path to the end of the path.
6. Path keeper (facilitator) indicates when a participant is OFF (the path) by saying OFF/ OR simply making eye contact and shaking the head no. When a participant is off, they leave the labyrinth to be followed by someone from the other group.
7. This exercise continues in silence until a participant/group follows the path to completion.

Start (1)				
2	3			
	4	5	8	9
		6	7	10
			12	11
			Finish (13)	
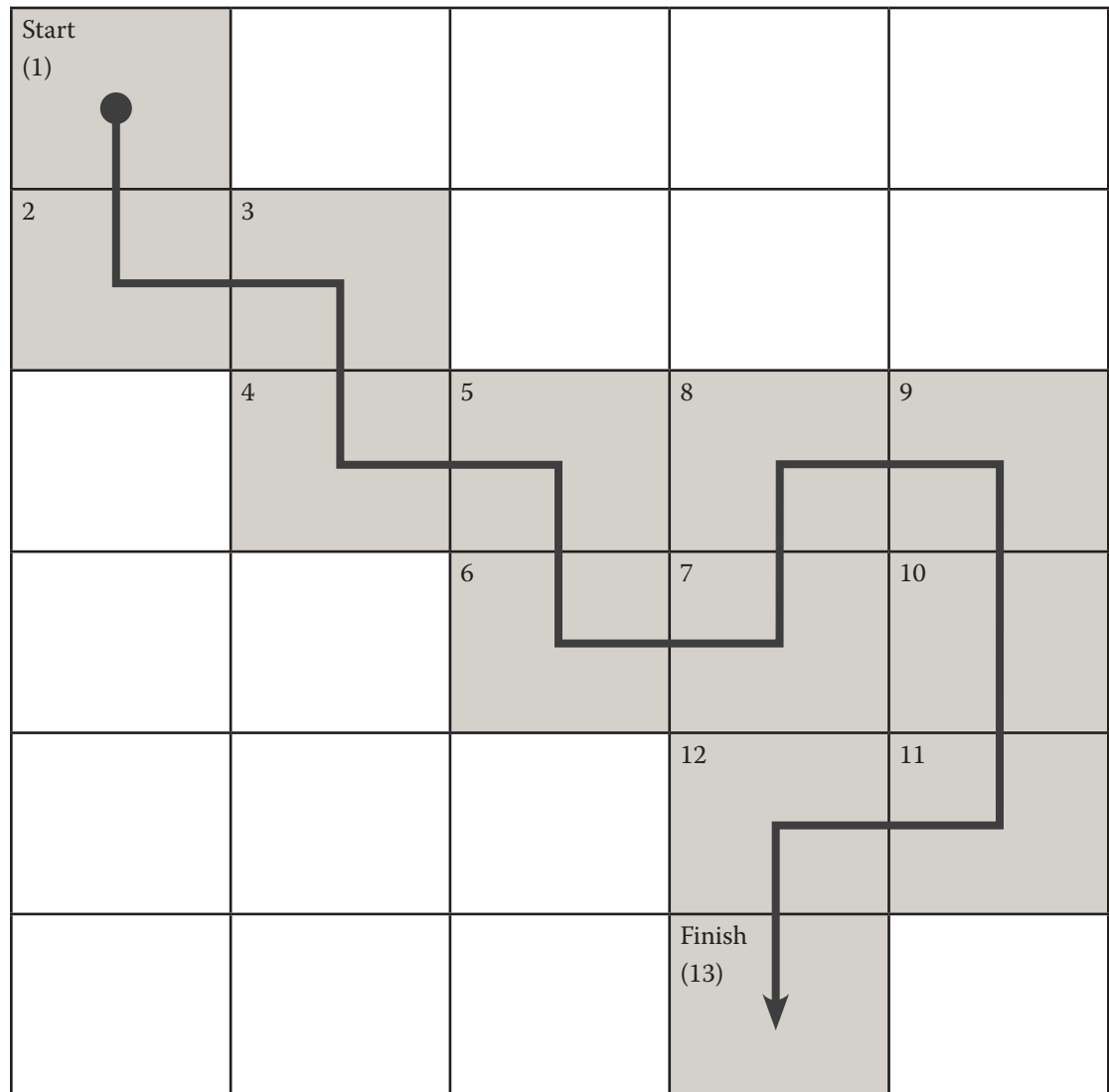
Processing Questions

- What was your strategy? How did you arrive there?
- How did you participate? What was your role as an individual in the conversation that concluded with that strategy?
- Did the strategy change as the activity progressed?
- What was surprising about the activity?
- What was frustrating about the activity?
- What was interesting about the activity?
- What sorts of parallels might be drawn upon to deepen our learning as they relate to collaboration?

Takeaways

- Working collaboratively is sometimes like walking in the labyrinth. You have to trust that the end will be revealed in time.
- Being open to the contributions of others makes collaborative work easier.
- Even when good plans are laid, they often change to meet the unexpected challenges before us.

Puzzle Collaboration

Purpose

The purpose of this exercise is to learn and practice teamwork and collaboration. In order to work together, we must recognize the importance of each person, communicate, and understand different learning styles.

Process

- One fifty-piece puzzle is needed for each four-person group (can expand the group to six if needed)
- Have the group distribute the puzzle among themselves (like dealing cards with the puzzle pieces)
- The goal is to put the puzzle together following these rules:

  1. You are to complete the puzzle.
  2. During the first round, the players take turns placing a piece of puzzle; they cannot talk to one another or touch other people's pieces.
  3. After one minute passes, tell the group: Continue, in silence, taking turns placing the pieces. You may still not talk, but you may now touch other people's pieces.
  4. After another minute passes, say to the group: You have two minutes to finish—you may talk and do anything you need to put the puzzle together.

Debriefing

- We often work in isolation without involving others whose pieces need to fit into the puzzle.
- We often use only one mode of communication to get things done.
- When we involve one another, using all the pieces and communicating in many different ways, we have a greater chance for successful completion of the project.

Adapted and used with permission from: Mary Jo Clark, Pat Heiny

UNIT SIX

Advocating for the Changes We Want

Overview

Purpose of Unit Six

Learning Objectives:

- Use leadership skills for change
- Define approaches to taking action on community issues
- Build an understanding of how to affect the public agenda
- Develop and communicate a message

Other Purpose of the Session:

- Create an advocacy plan that participants may wish to implement in the community

Unit Six allows participants to apply their new leadership skills to effect the changes that will make Kansas the best place in the nation to live and raise a family. Participants will learn how to frame and define issues, gain knowledge of the vehicles and avenues available for policy change, and identify ways to use their knowledge of groups to coalesce people around issues that affect their lives.

During Unit Six, participants will apply their leadership skills to advocate for the changes needed for a healthier Kansas. This unit will allow real-world opportunities for participants to use their leadership skills to improve the lives of children and future generations in Kansas. There will be the opportunity to craft an actual message and begin to plan a local advocacy campaign.

Participant Agenda

I.   Welcome and Overview

II.   Moving From Talk to Action

III. From Collaboration to Advocacy

IV.   Building the Case for Change

BREAK

V.   Choosing Collaborative Responses

VI.   Advocacy: A Tool for Change

BREAK

VII. Presentations

VIII. Closing Circle

Advocating for the Changes We Want

Learning Objectives:

- Use leadership skills for change
- Define approaches to taking action on community issues
- Build an understanding of how to affect the public agenda
- Develop and communicate a message

Other Purpose of the Session:

- Create an advocacy plan that participants may wish to implement in the community

Questions to be Addressed:

- What kinds of community issues are ripe for this approach?
- Who in our community are possible partners for these issues?
- How can we work together and advocate for change?
- What is the role of citizens in this process?

Unit Six allows participants to practice their new leadership skills to affect changes using real world examples from their community. Participants will learn how to frame and define issues, gain knowledge of the vehicles and avenues available for policy change, and identify ways to use their knowledge of groups to coalesce people around issues that affect their lives.

Also during Unit Six, participants will apply their leadership skills to advocate for the changes needed in their communities. They will have the opportunity to craft an actual message and begin to plan a local advocacy campaign.

Background for Lead Facilitator

Kansas has in its history one of the real champions for public health—Dr. Samuel J. Crumbine of Dodge City. Known for the famed "Don't Spit on the Sidewalk" campaign, Dr. Crumbine understood the importance of messaging and advocacy to get the public's attention on health issues. After a 1910 report on the state of medical schools in which the University of Kansas School of Medicine's organization and clinical instruction was criticized, the Board of Regents sought a dean for the School. The person the board wanted was Dr. Crumbine. Leaving his position as executive secretary of the Kansas State Board of Health, Crumbine sought to change the way the medical school operated but also used it as a platform to improve the public's knowledge of its own health and health risks. His lasting legacy was his commitment to bring issues of public health to public and professional groups throughout Kansas and the nation.

In many respects Unit Six will prepare participants to take up the mantle of Dr. Crumbine. He knew that for health statistics to change, the public must be informed and involved. His message for getting people to focus on the everyday issues that affect their health was known widely.

Advocacy is one of the ways your participants may choose to apply their newly acquired leadership skills. While advocacy can be thought of as following or having an opinion on an issue, actually it has a larger purpose. We are defining it for this unit as "the actions that individuals or organizations take to promote issues or policies that would benefit society broadly." Participants will need a basic roadmap for advocacy that allows them to put their new skills to work.

It is true that a journey of a thousand miles begins with one step but before taking that step, it is wise to pack. The first exercise will remind participants of the tools (skills) available for their use. The next steps when advocating for change are defining and framing a community issue. Some of this work has been done in previous units. A significant amount of time in this unit will be devoted to crafting a message to rally community support around the issue(s). We have outlined some ways in the following discussion for your participants to think through each of the steps necessary to advocate for change.

Let's Begin with a Set of Basic Questions

These will be helpful to keep in mind as you guide participants through the exercises to move them from talk to action. Visit with other facilitators if necessary to make sure you fully grasp the concepts and ideas the group will be generating in their first exercise. As participants brainstorm their newly (for some) acquired skills, you can point out how they can be used in advocacy of their issues.

- What is the issue? What are some statistics or stories that illustrate this issue?
- Why is it a problem? Why should anyone care?
- Who is affected? Are some groups in the community more affected by this issue than others?
- What are the consequences for the community?
- When did this issue become a problem? Is it getting worse?
- Where is this problem the worst? Are there some areas of the community that are more affected than others?
- How did this become an issue? What are the factors that led to this becoming a problem in your community?

Now you are ready to frame your issue for public deliberation and action. Taking the issue you defined, answer the following questions in order to frame your issue:

- Starting with the factors that led to the issue becoming a problem in your community, what do you think can be done to address these factors?
- What are some actions that can be taken to correct the problem?
- At the minimum you should have three or four different suggestions for taking action.

Turning An Issue into a Campaign

By now participants should have a lot of information at their disposal — maybe too much information. That's good, they are becoming experts on their issues by just thinking about them and doing basic research to gain statistics and stories.

One way to proceed from issue definition to organizing a campaign is as follows: Create a tentative mission statement on your own; make it as broad and inclusive as possible but be sure to include the intended outcome of your campaign.

Then think about people to invite to a meeting about your campaign. There are a few different ways of organizing the guest list. Some of your participants may have special expertise in this area. Feel free to have them share their knowledge in the larger group.

One way we have already mentioned is to just list all the possible partners you can think of that will be friendly to your purpose. The problem with this approach is that it does not address core problems that campaigns face such as a need for resources or specific technical skills. Your campaign might share a common purpose with Group X but Group X may not be willing to lend its resources or personnel to your cause. Luckily, there are other ways of tackling this question. You can start by thinking about roles of people in a campaign and proceed to considering who might best fill those roles.

Another way of approaching this question is to think about the assets or resources you will need for an effective campaign. Finally, if all else fails, then you may have to consider the question from the angle of "Who is available to help?" Maybe your campaign will involve big time commitments from its members on weekday mornings. Retirees or people with flexible schedules might be a logical fit for a campaign with those requirements.

Once you have created a tentative mission statement and used it to assemble a group, create an agenda with topics that need to be decided. The first item is to reopen the question of a mission statement and use this as an opportunity to welcome the interests of the people you have invited. Try, as best as possible, to incorporate ideas from the group into the goals and objectives without jeopardizing your focus on the intended mission. For instance, you might be willing to accept particular changes to the means by which you achieve your goal. For example, if the issue is a new stoplight for a busy intersection then you might accept this as your objective and allow for multiple ways of accomplishing the task including a letter-writing campaign to elected officials, calls to the local planning commission, canvassing the neighborhood with a petition, or undertaking a media campaign to raise awareness of the problem. Any one of these might be effective, or all of them at once; the point is that you can achieve your objective by more than one means — be sure to use this as a way to be flexible and inviting to those willing to offer their assistance.

Advocacy Strategies

In any democracy there is a wide range of possibilities for affecting policies and practices in one's own community. One way of thinking about how to make changes in our communities is to think about what you want the role of your organization to be in this effort. Below is a list of types of roles organizations have adopted when advocating for change. Your organization might choose to adopt one or more of these strategic roles within your community. These roles are not exclusive to each other but some will fit together more easily than others. Handout #1 & #2 elaborate on these options.

Developing a Clear Message

Before advocating for an issue, participants will want to develop their message. People encounter messages about issues every day. A well-developed message is attention-getting, memorable, and communicates something that your group deems necessary about the issue — its urgency, action people can take on the issue, or why people should care. Get participants to think of the particularly effective public health campaigns around smoking, seat belts, etc. Using Handout #3, participants will determine the best target audience for their message. Handout #4 will help them draft an effective message. The final activity will provide immediate feedback to participants as they present their message to the large group. Everyone will help debrief the groups by helping answer the questions: What worked well? And, What would you change?

Communicating Effectively (and Over and Over)

Have you ever watched a political debate? The best politicians are good communicators. They make their point briefly, offer three supporting facts, and repeat their message over and over. Quite often people watching debates will get frustrated — why aren't the politicians answering the questions they're asked? The answer is that they are using each question as a new opportunity to restate the points they want to convey. A good politician enters a debate with a message he or she wants to communicate; this should serve as a good lesson to anyone who wants their organization to communicate effectively. There is much more to effective communications for any organization than just message. But the message, and its repetition, is the heart of the matter.

What else is there? For one, you will likely need to identify key groups with which you will want to communicate. These groups might include financial backers (or potential financial supporters), volunteers (or potential volunteers), elected officials, the general public, or maybe publics in specific geographic areas or who live in particular types of housing. With whom you communicate will depend on your issue and what steps you want to take to improve the situation at hand. In this unit we will focus on two types of communication and what you will need to do to employ them effectively.

A Final Word on Sustainability

So far we have focused on how to organize a group around an issue and execute an effective community campaign. Sometimes all that is needed is a single campaign executed once in order to put a community issue to rest. For instance, a coalition to install a new streetlight at a busy intersec-

tion might form and then, once the stoplight is installed, disperse. Other problems are much more intractable, though, and need long-term commitments from community organizations. Share this information with participants if the nature of their issue demands an extended commitment.

First, examine existing resources. What are the costs in terms of money, labor, or other resources? How are they being met? Is the funding stream sustainable from one year to the next? If not, what are other sources of funding options? As they organize, groups may decide that financial backers are of particular importance to the camapaign. If so, what do they want in exchange for their support? How can you maintain the interest of existing financial backers and attract new ones? These are questions you will have to ask in order to maintain the resources you need to continue effectively addressing your issue.

Second, examine your staff, labor force, and/or partners. Does your staff have sufficient technical expertise to run an effective campaign? Do you have enough volunteers? Do they feel like they are making a difference? You may want to consider annual events to reward your network of volunteers such as a picnic or an award ceremony with prizes given for exceptional service. For smaller organizations, just inviting volunteers to your office or a local park for some good food is a great reward and much appreciated. Make sure to have all the contact information for your volunteers so you can find them when you want to reward them — or make use of their willingness to lend a hand.

Finally, and perhaps most importantly, evaluate your efforts. Set measurable goals and review your progress at the end of the year. It is helpful to set a range of goals:

- Short-term (3-6 months) (change in behavior)
- Intermediate-term (6-12 months) (change in skills and knowledge)
- Long-term (12-36 months) (change in attitudes and action)

Be honest. If you did not progress as far as you might have liked, then use this as an opportunity to explore why. Perhaps you were close to success but were missing one vital link. What was that? Do not be afraid to evaluate your efforts, and do not avoid taking the time needed to evaluate. Use the results of your evaluation as an opportunity to discuss your organization's efforts with your partners; let them know what you think went wrong and how it can be fixed. Evaluation, when handled properly, can help you write the story of your organization and what it has done to help your community advocate for change.

Advocating for the Changes We Want

Learning Objectives:

- Use leadership skills for change
- Define approaches to taking action on community issues
- Build an understanding of how to affect the public agenda
- Develop and communicate a message

Other Purpose of the Session:

- Create an advocacy plan that participants may wish to implement in the community

Before the Meeting (facilitation supplies and materials needed):

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Premade Flip charts

Create large charts or posters including these items.
- Definition of Advocacy (feel free to add other definitions)
  - Advocacy (in the broad sense) is putting knowledge to use for the purpose of social change.
  - To advocate means to speak for those who have no voice or representation.

Wall Charts from Previous Sessions

- Twenty-first Century Performing Communities
- The Best Test for Servant Leadership
- Tool Box with capacities to date
- Others as appropriate

Handouts

- Overview for Participants
- Participant Agenda
- Handout #1 Advocacy Strategies
- Handout #2 Tips for Gaining Media Attention
- Handout #3 Key Decision Maker Chart
- Handout #4 Seven Tips for Framing Effective Messages

Supplies

- Flip charts
- Non-permanent markers
- Paper
- Pens

Creating the environment:

Suggested Theme

Making change together is the learning from this unit — moving forward. Use motion as the theme with toy cars or trains and the message that you are moving forward, backwards, or standing still but something is happening. The tables should have a few cars, markers, and an appropriate quote. Henry Ford's "Don't find fault; find a remedy" would build on the car theme.

If you use this (or any theme), discuss it with the class. What symbolism do they see in the theme elements?

Room Set-Up

Round tables for 6-8.

Session Script

Session Overview

Welcome and Overview	30 minutes
Moving From Talk to Action	30 minutes
From Collaboration to Advocacy	15 minutes
Building the Case for Change	30 minutes
Break	**15 minutes**
Choosing Collaborative Responses	30 minutes
Advocacy: A Tool for Change	60 minutes
Break	**15 minutes**
Presentations	30 minutes
Closing Circle	15 minutes
Total Time	**4 hours, 30 minutes**

As People Enter
30 minutes

Materials: Flip chart paper, non-permanent markers

Ask participants to write on a wall chart one word about what advocacy means to them.

Welcome and Overview
30 minutes

Materials: Overview, Participant agendas

Welcome the participants for the advocacy session and emphasize that we have been working toward this time from the very beginning—taking what we have learned to action.

If appropriate, introduce special guests, the working committee, sponsors, etc. Take time to cover logistics, such as where restrooms are, when formal breaks will take place, and where people may smoke. Remind people to turn cell phones and other electronic devices to a mode that will not distract the class.

If you are planning a class celebration or graduation separate from the final session, consider discussing details and expectations for that.

WELCOME AND AH-HA'S

Review capacities learned to this point. Ask:

- What insights about collaboration have you had since the last session?
- You looked at several community issues in the last session. Has anything happened recently that affects those issues?
- What did you learn about the issues from your fellow class members?
- Who in the class has – or has considered – running for public office? What has influenced your willingness to serve in this way?

Questions to open this session's topic on advocacy:

- What does advocacy mean to you? Review responses from wall chart.
- For whom have you been an advocate? In what way?

Moving From Talk to Action
30 minutes

Materials: Flip chart and non-permanent markers

WHY: To understand and reinforce the leadership skills needed to take action.

HOW:

During this session ask the group to reflect on the skills and ideas that have built their confidence or increased their knowledge about changing things in their communities and how that might be done.

1 Divide into small groups.

2 Brainstorm the skills and attitudes that will allow them to take action on issues they care about. (10 mins)

3 Ask each team to report on the things that they have learned or taken away about action. Compile into a master list. (15 mins)

4 Ask: *Seeing these, what other skills and attitudes do we need to add to the list?* (5 mins)

Say: *The rest of the day will be spent developing an advocacy campaign to promote action on the issues identified last session.*

From Collaboration to Advocacy
15 minutes

Materials: Flip chart, non-permanent markers, pens, and paper

WHY: To recall progress made last session on defining an issue and designing a collaborative effort.

HOW:

1 Have participants return to the groups they worked in during the last session. (5 mins)

2 Have participants review their issues, the stakeholders concerned, possible responses of community members to the issue, strategies for bringing people together around the issue, and strategies for sustaining momentum. (10 mins)

Say: *Often collaborative efforts point out a need to influence community perception and/ or policy. We're going to use the issues you worked on last session to practice creating an advocacy effort around the issue. If possible, we hope that your issue or some element of it is something you might like to see accomplished in the community so that this practice opportunity can be the basis of a real community advocacy plan.*

Building the Case for Change
30 minutes

Materials: Flip chart and non-permanent markers

WHY: To further clarify the issue and to help groups decide what action to take.

HOW:

1 Ask the groups to consider these questions: (It is okay to state the obvious.) (20 mins)
  • What are the problems associated with this issue for the community?
  • What are the potential benefits of progress around the issue?

2 What are some of the factors that led to their issue becoming a problem in their community? Ask the groups to write down as many as possible. (10 mins)

Break
(15 Minutes)

Choosing Collaborative Responses
30 minutes

WHY: To consider what action to take on each group's issue.

HOW:

1 Say: *Think about the factors you identified that contribute to the problem and stakeholders who may be involved in changing it. Identify at least three actions that most stakeholders could agree on.* (15 mins)

2 Say: *For at least one of those actions, consider what needs to change to accomplish the action. Consider changes in community awareness, attitude, behavior, beliefs, and policy.* (15 mins)

Advocacy: A Tool for Change
60 minutes

Materials: Handout #1 – Advocacy Strategies, Handout #2 – Tips for Gaining Media Attention, Handout #3 – Key Decision Makers Chart and Handout #4 – Seven Tips for Framing Effective Messages

Handout #1 – Advocacy Strategies and Handout #2 – Tips for Gaining Media Attention

Say: *There are many options for creating change. One of them is advocacy.* Distribute Handouts #1 Advocacy Strategies and #2 Tips for Gaining Media Attention.

Definition of advocacy:
- *Advocacy (in the broad sense) is putting knowledge to use for the purpose of social change.*
- *To advocate means to speak for those who have no voice or representation.*

Advocacy campaigns can affect community awareness, attitude, behavior, beliefs, and policy.

  Advocacy concerned with affecting legislation and policy is called lobbying, but this is only one part of advocacy.

  Think about the leadership skills we have discussed to date. How do these skills intersect with advocacy skills? Discuss with the group. (15 mins)

Handout #3 – Key Decision Makers Chart

❶ *You just identified the changes necessary to take action on your issue.* Distribute Handout #3 Key Decision Makers Chart. *To accomplish those changes, who is the person or group with the authority or influence to make a decision?* (5 mins)

❷ *Often people with the authority or influence to make a decision for change are themselves influenced by various groups. Who are the key pressure makers for this person or group?* List 3-5. (5 mins)

❸ *What method would you use to present your thoughts for change to each of these people or groups? Consider all the different ways you can communicate:*
- *Direct contact (i.e. letters, face to face meetings)*
- *Traditional media campaign (i.e. public service announcements, letters to the editor, TV interviews)*
- *Social media (i.e. facebook, myspace, twitter)*
- *Speeches*
- *Events*
- *Legislative lobbying.*
  (10 mins)

Handout #4 – Seven Tips for Framing Effective Messages

❹ *Choose a method to influence one key pressure maker. Create a rough draft of your letter, speech, interview, or whatever method you choose.* Distribute Handout #4 Seven Tips for Framing Effective Messages. (25 mins)

After a break, each group will have 5 minutes to present its work to the whole group.

Break	*(15 Minutes)*

Presentations
30 Minutes

Each group presents a rough draft to the whole group in 5 minutes. Creativity is encouraged. (20 mins)

Debrief the exercise:
- What worked well?
- What would you change?

(10 mins)

Closing Circle
15 Minutes

Thank the participants for their time, effort, and respectful attitude toward one another. Ask participants:
- *Reflecting on the day's work, what stage of performing communities would you say our group is in? What have you observed that leads you to your conclusion?*
- *Would running for elective office change your ability to effectively advocate for these issues?*
- *How will what you learned today affect your plans for using your leadership skills to affect your community?*

HOMEWORK: (Choose one)
- Read the local newspaper this week and bring back specific issues that affect the health of the community or relate to the issues you discussed today.
  ° Who/what organizations are featured in these activities?
  ° Does the article detail the community impact of the issue?
  ° Is it clear from the article why we should care about the issue?

- Identify one advocacy group in the community.
  ° What is the issue being addressed?
  ° Who are the partners involved?
  ° What is the strategy used?

Advocacy Strategies

In any democracy there is a wide range of possibilities for affecting policies and practices in one's own community. One way of thinking about how to make changes in our communities is to think about what you want the role of your organization to be in this effort. Below is a list of types of roles organizations have adopted when advocating for change. Your organization might choose to adopt one or more of these strategic roles within your community; these roles are not exclusive to each other but some will fit together more easily than others.

Issue Expert

Here your organization will focus on information relevant to your issue and make yourself available for organizations and individuals in need of issue-specific information. Issue experts will be expected to serve a number of purposes including, but not limited to:

- Providing comments following events and news incidents requires clarifying the meaning of the event or putting it in context
- Contacting news organizations about factual errors in news reports can be described broadly as dispelling rumor and providing the best facts for the public to make an informed opinion on the issues.
- Investigating questions for reporters writing a story relevant to your issue often involves providing reporters with statistics, sometimes images or pictures (especially if the reporter is Web-based), and contact information for reporters to interview individuals whose lives have been affected by this issue.
- Preparing fact sheets or background information is important for sharing via the Web or print-based publications distributed to policy makers and other decision makers.

Issue Publicist

The role of issue publicist is to draw attention to a problem through events that attract public attention by media coverage or other means. These events will (you hope) alert the public to an existing problem and provide them with ways in which they can take action to remedy the problem. Issue publicists will be expected to fulfill a number of purposes including, but not limited to:

- Organizing information fairs in public gathering places such as malls, parks, college campuses, and on sidewalks in city centers. Be sure to bring something that has information about your issue printed on it such as handouts, brochures, or even postcard-sized materials that individuals interested in your issue can take with them.
- Designing a speaker series for particular audiences that you would like to persuade. For instance, if your issue relates to child safety, then secure commitments from experts in child safety to speak with children at schools and with parents at school assemblies. For the best results, make this a series of speaking events involving individuals with different types of expertise in the issue area.

- Creating events that provide news outlets with visuals that call attention to your issue. Pictures of children or provocative images are eye-catching and effective.
- Writing letters to the editor or op-ed pieces for numerous local newspapers. This is a great way of reaching the most influential residents in an area.
- Celebrating anniversaries or successes related to your issue. Some groups will nominate a particular day of the year as a day to honor their issue; this day is often tied with the date of an important local or national event related to your issue. For example, National Children's Day or National Immunization Awareness Week might be good times to launch a campaign on certain issues related to children.
- Creating public events such as press conferences to provide reaction to newsworthy events related to your issue. These will be more focused on substantive matters related to your issue. They are usually short on images and visuals but long on quotes and a question-and-answer dialogue between reporters and representatives of your issue.

Issue Advocate

The role of the issue advocate is to seek policy changes on the local, state, and federal levels. Issue advocates will be expected to understand the sensitive nature of public office and approach their elected officials and bureaucracy accordingly. Issue advocates will be expected to serve a number of purposes including, but not limited to:

- Identifying the elected officials at each level of government in the local area and their position toward your particular issue.
- Identifying other elected officials that are not from your local area but who may have an interest in promoting your particular issue. If you can find elected officials who are sympathetic to your issue, then their office may be able to put you in touch with other groups working on the same issue.
- Identifying specific bureaucratic departments or legislative committees assigned to work on your issue. There may be more than one committee or department as governments sometimes have overlapping responsibilities. Think broadly. If your issue is an environmental one, then you definitely want to consider environmental committees that deal with harbors and waterways, energy issues, or land use issues.
- Identifying interest groups that advocate on behalf of your issue can often put you in contact with other individuals concerned with your issue and possibly in a position to help or offer advice.
- Contacting elected officials to express your view as a voter. Make sure the representative knows you are from his or her district and are starting a campaign to address the issue. Be positive, even if the representative has not supported your issue in the past. Offer information about the issue and a chance to be involved with your group and help resolve the issue. Be specific with your requests; presenting a brief (one to two paragraph) proposal is often a good idea. Even if the representative refuses to give assistance, leave open the possibility that you might become partners in resolving this issue in the future.
- Working with elected officials and local government to have public meetings on the issue. Coordinate among agencies and interest groups to bring a wide array of resources to the table.

Tips for Gaining Media Attention

- Create a media plan and message.

- Prepare a media list and keep it current.

- Become a master interviewee.

- Stage an event.

- Submit a letter to the editor.

- Arrange an editorial board meeting.

- Write a guest opinion (op-ed).

- Put out a news release and follow up.

- Respond to stories in the news.

- Contact journalists in advance.

- Use community calendars and public service announcements.

- Use radio call-in shows.

- Hold a news conference when you have specific news to announce.

Jason Salzman and Paul Klite, media consultants. (Adapted from Joanne Edgar, Using Strategic Communication to Support Families, Baltimore, MD: A report in a series from the Technical Assistance Resource Center of The Annie E. Casey Foundation, 2001.)

Key Decision Makers Chart

- Identify who has the authority to make a key decision for this issue. Write his or her name in the circle.
- Next, identify what people, organizations, or pressure groups influence the key decision maker. Write their names in the surrounding boxes.
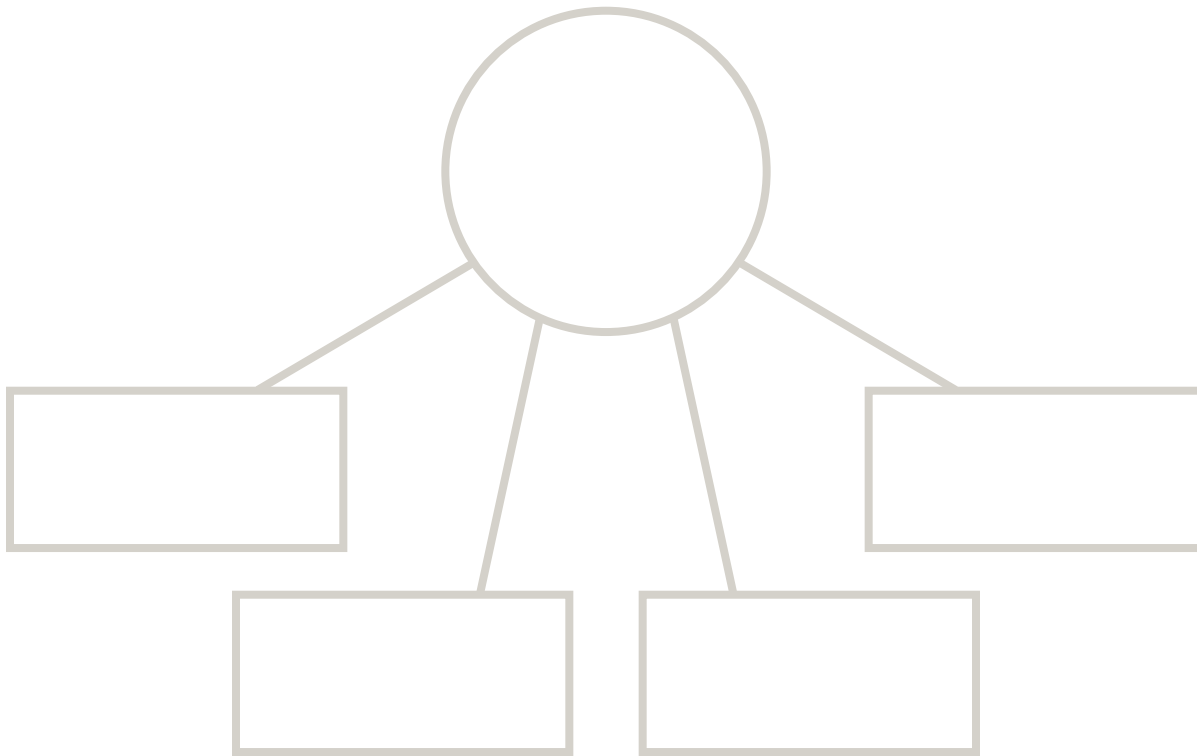
Material sourced from: Cohen, David, De la Vega, Rosa, and Watson, Gabrielle. (2001.) Advocacy for Social Justice: A Global Action and Reflection Guide*. Bloomfield, CT: Kumarian Press, Inc.*

Seven Tips for Framing Effective Messages

1 Effective messages are clear, consistent, and free of jargon.

2 Effective messages include stories about people and issues. Spokespeople are good storytellers who bring in the policy implications and community context in every personal story.

3 Effective messages are realistic and truthful. Spokespeople do not promise more than they can deliver, and they are prepared to talk about what does not work as well as what does — and the lessons learned from both.

4 In preparing effective messages, communicators identify target audiences and survey them early on to gauge their understanding of the issues. Listening is as important a skill as lecturing.

5 Effective messages are specific and local. Different messages will be needed for different audiences.

6 Effective messages are spread through materials that are varied and visually interesting. Core messages are repeated over and over again.

7 Effective messages include logos, Web addresses, and phone numbers on every product, even things like refrigerator magnets.

Unit Six Extras and Additional Materials

If you want more context ...

Visit a meeting

- If it has not happened at some other point in the class, this session is a good opportunity to invite class members to attend a local government meeting. Whether it is a township council, tourism board or the trustees of a community college, there is an opportunity for learning. Ask class members to report back (in writing or as a presentation) and answer such questions as:
  - What is the purpose of the organization?
  - How do the members get elected/appointed?
  - Who else attended the meeting?
  - What is the format and frequency of the meetings?
  - What were the issues discussed when you attended? How were the issues debated or resolved?
  - What advocacy efforts did you see in the meeting?
  - What leadership skills did you see exhibited?

Suggested time: Out of class activity

Social Change in History

- Show or assign a movie about an individual or group who created social change. *Ghandi* and *Romero* portray leaders who acted out of service and advocated for change in both formal and informal ways. *The Freedom Writers* and *Patch Adams* show leaders who begin advocacy by developing relationships and then choose to influence systems that have strong traditions and limited resources.

- Debriefing questions might include:
  - What were the issues at the heart of these stories? What was at stake?
  - What kinds of advocacy did you see at work in this movie?
  - If you assume that the adversaries in these stories did not consider themselves to be "bad guys," what were their motivations?

° Who needed to change in this story? Who influenced those people?
° What will you do differently related to issues you care about after knowing this story?

Suggested time: 2 ½ hours or out of class activity.

If you want to increase knowledge of/interaction with the community ...

Social Services/Non-Profits

• Invite a speaker from Court-Appointed Special Advocates (CASA) or another program that provides an individual advocate for someone who needs a voice. How does the program work? How is the relationship developed between the advocate and the person served? How does it make a difference for the person? How does it make a difference for the system? How can we support your work?

• Debriefing questions might include:
° Who else in our community needs a voice, whether in the courts, in social services or in the Legislature? Who is helping provide that voice?
° How does advocacy for an individual differ from advocacy for an issue?
° How do you balance telling stories that will impact and influence people with preserving the privacy and dignity of the people affected?

Suggested time: 45 minutes

Business and Government Applications

• Divide the class into teams and ask them to visit key leaders in organizations to learn about their advocacy and lobbying efforts. (Destinations might include the county, the city, the school district, the chamber of commerce, agencies that serve people with disabilities, agencies that serve senior citizens, Farm Bureau offices and landowners' associations.) Have the teams ask questions such as:
° What are the statewide issues that most affect your organization (or the people you represent)?
° What are the local issues that most affect your organization (or the people you represent)?
° What strategies do you use to stay current on issues?
° What strategies do you use to educate your employees, board members or constituents on issues?
° Do you have lobbyists or belong to a lobbying organization? Why?
° What other methods do you use to influence public opinion?
• Have class members report their findings.

Suggested time: 90 minutes

• Invite a professional lobbyist to speak to the class. What does a lobbyist do? How does a lob-

byist find clients, and how do people who want to influence policy find a lobbyist? What are the benefits to having lobbyists as part of the legislative process? What are some drawbacks? What are the misconceptions about lobbying? What is different about lobbying at the local, state and national levels?

- Debriefing questions might include:
    - What is the value of a lobbyist to people who believe in an issue?
    - What are ways that class members can more personally influence an issue?
    - What barriers are created by a system that is dependent on lobbyists?

Suggested time: 45 minutes

If you want an energetic activity ...

Class Response/Presentation at Class Celebration

- Either during session six or as an out-of-class activity, invite the class to plan a creative class response describing their experiences in this leadership class. They may work in teams or as a full group, and they may speak it, sing it, dance it or illustrate it. This class response will be shared at your final celebration or final class celebration.

Suggested time: 90 minutes or out-of-class activity.

Role Play a Meeting

- Create a role play scenario of a meeting of a city council, county commission or legislative committee hearing. If possible, use the official meeting room of the body. Assign every class member a role, such as commissioner, counselor to the commission, person speaking to the commission, or member of the media. Set up a topic that will cause some debate. Depending on the personality of your class, this can be an opportunity for something very silly, such as impending intergalactic invasion; something that some would dismiss as trivial but some would have strong feelings about, such as required school uniforms; or an issue that is alive and controversial in your community.

- Debriefing questions might include:
    - What was hard?
    - How did the structure of the meeting serve/not serve the issue at hand?
    - What were the opportunities for advocacy? How effective were people at using them?
    - Were there points of chaos? How did members of the group respond to them?
    - What would the meeting have been like if there were no media present? If there were no members of the public speaking?

Suggested time: 60 minutes

If you want to ask more questions ...

Questions to use in debrief sessions, opening or closing circle

- Who are the people who influence you?
- Who are the people you influence?
- How are some of the active issues in our community framed? What are some other ways they might be framed?
- What are the opportunities for advocacy at a work team level?

Suggested time: 15 minutes

If you want to connect the topic to the class project(s) ...

Getting Media Attention for your Class Project

- Whether it is part of a larger advocacy effort or not, the class project(s) can be a great opportunity to practice getting media attention. Have the class (or class project groups) use the handout "Tips for Gaining Media Attention" and create and implement a plan to let the community know about their project, the people or organizations who helped with it, and how it serves the community.

Suggested time: 30 minutes

UNIT SEVEN

Growing and Celebrating as Leaders

Overview

Purpose of Unit Seven

Learning Objectives:

- Develop personal mission, goals, and action plan
- Understand and tie together all that has been learned
- Celebrate leadership learning experience

Other Purposes of the Session:

- Evaluate personal growth as a servant leader
- Debrief the project and/or advocacy group experience
- Celebrate the group and the relationships formed

During the course of this leadership program, we have been introduced to several different approaches to leadership, we have made new and deeper connections with others, and we have discussed some current community issues. This final session gives us an opportunity to consolidate all of our learning as we continuing thinking about its application in our lives and communities. We will be wrapping up our experience through personal and group reflection.

In this unit, we will each be writing a personal mission statement and accompanying goals and we will be sharing these with each other. We will also be celebrating the successful completion of our leadership program, setting out to improve our communities with the new skills and friendships we have gained.

Participant Agenda

I.   Welcome and Overview

II.   What We Have Learned about Facilitative Leadership

III.   What We Have Learned as We Have Worked with Others:
       How Did Our Teams Work?

BREAK

IV.   You as a Leader

V.   Developing a Mission and Goals

BREAK

VI.   Changing Our Community—First Things First: Creating Our Plans

VII.   Time for Celebration and Group Reflection

Growing and Celebrating as Leaders

Learning Objectives:

- Develop personal mission, goals, and action plan
- Understand and tie together all that has been learned
- Celebrate leadership learning experience

Other Purposes of The Session:

- Evaluate personal growth as a servant leader
- Debrief the project and advocacy group experience
- Celebrate the group and the relationships formed

Questions for Personal Reflection:

- Why is it that people get so excited at training sessions but then do not do anything differently when they go back home?
- How has servant leadership been internalized in behavior and attitude?
- What do I now believe about working with others?
- What are my personal passions and interests?
- How am I going to try to impact my community?
- What is my personal responsibility to my community now that I have had the privilege of this leadership learning experience?

Questions for Group Reflection:

- How are we going to impact our community?
- What have we learned about performing groups that we can use with our families, in the workplace, and in the community?
- How can we balance our desire to help the community with the needs of family and personal time?
- How will we as a group sustain the energy and motivation we feel at this time?

This final session will give participants an opportunity to consolidate all of their learning and continue to think about its application in their lives.

Background for Lead Facilitator

This final session will give participants an opportunity to consolidate all of their learning and continue to think about its application in their lives. You will be asking them to reflect on their personal growth but also their hopes and dreams as a group. Richard Harwood states in *Make the Leap*, "Engaging people in learning new public ideas and practices is nothing short of a journey; there is no easy fix." Harwood describes this leap as the point when participants on this journey experience a "personal transformation of their ingrained reflexes and old working assumptions." The format of this session provides an opportunity for the reflection needed to make this leap. The participants have, by now, created a trusting learning community that will allow this reflection to be more honest and open.

Servant Leaders Ready to Change Their World

The Kettering Foundation commissioned The Harwood Institute to research the kinds of leadership skills and practices required for twenty-first century communities. This research resulted in an interesting look at how to create community change by intentionally developing leadership. Harwood and his associates remind us that: "Far too often we do not fully understand, or we simply resist putting into practice, what we know it takes for people and groups to learn new public ideas and practices." As a process, public learning is "the mixture of layers and steps of interaction required to reach a shift in thinking and acting." This Kansas Community Leadership Institute curriculum has been designed to provide the layers and steps of interaction for your class members to make some of the necessary leaps. As you begin this last session, remind them of the elements of their leadership journey—all of the processes and capacities in their tool box. Suggest to them that the leadership journey will be ongoing and that their classmates and your organization will be part of their continuing journey as well.

As the lead facilitator you want all of the participants to leave the program with the capacities as well as the desire to help improve their community. Yet, an ever-present challenge for leadership organizations is to not imply that every participant will—or should—serve in exactly the same way. Bill George, writing in the Winter 2004 issue of *Leader to Leader*, shares this concern: "The one essential quality you must have to lead is to be your own person, authentic in every regard." He believes that authentic leaders:

- Understand their purpose
- Practice solid values
- Lead with heart
- Establish connected relationships
- Demonstrate self-discipline

Underscore that part of this last session will be to drill down on the passions that will affect how and where participants lead.

New Approaches to Leadership

During the course of this leadership program, you have introduced participants to several different approaches to leadership. If there were other facilitators for any of the units, visit with them for insights prior to presenting this material. You discussed in Unit One that the old models of "one or

a few deciding for the many" were not working and could not work in today's world. The concept of servant leadership was the primary model used. It is important now to "unpack" how people feel about the concept at the conclusion of their program, acknowledging full well that the term "servant leadership" can cause discomfort and pain to some people because of the historical connotation and practice of servitude in our country and around the world. You should acknowledge this again before going forward and allow any feelings about the term to surface or re-surface. Probably the group is feeling more and more comfortable with the concept as it is a vital part of the ongoing learning process for new leadership skills.

Start with yourself first. Make a commitment to be a role model for valuing diverse perspectives.

While the annotated agenda has some ideas for discussion and debriefing, let's review the steps of the Learning Cycle as it might apply to the overall theme of collaborative leadership.

Throughout the entire program, participants have come to recognize the characteristics, attitudes and practices of new approaches to leadership. However, the goal of this curriculum is to inspire the participants to see themselves as collaborative, servant leaders. To this end the lead facilitator must furnish the appropriate questions to lead to this insight. Questions leading to reflection and insight are essential for internalizing new behavior. (Refer back to Unit Four for discussion on questions and Appreciative Inquiry.)

Following the Learning Cycle, first remind the participants of their observations. Have them think back over all of the people they and their fellow participants have identified as servant leaders. What do these people have in common?

Next, ask questions that lead to generalized observations. For example: Do you now have a different perspective of servant leadership than when we started? How are the leadership characteristics you have observed different than what you thought were traditional leadership characteristics? How many of the servant leaders identified were people in positions of power?
Questions for application lead to the internalization we desire. How can we work to model these characteristics in our personal and professional lives? How would our family/ committee/ company/ community be different if everyone worked as a servant leader?

The Importance of Reflection

The dictionary tells us that "mirror" is a reflection, a true picture of something else, to reflect, something that gives a faithful reflection. The act of "mirroring" is a process of reflecting back to a person the strengths you see in them.

Most people do not know what they do well. This is true of both children and adults. One of the key responsibilities of a leader is to focus on people and help them realize and develop their strengths. Groups in chaos are often full of people who do not know their gifts. Often people are difficult to work with because they do not see the positive things they bring to a group or to a relationship.

Mirroring is a key tool for a person who wants to empower others. Convey this message to participants loud and clear. It can be done in a variety of ways. Informally, an individual can encourage others by telling them what they do well, what they bring to groups and what their natural gifts and talents are.

Difficult people in a group often feel insecure or do not see a role for themselves in the group. Helping them see their strengths and find their roles helps them to participate better in the group. As Ralph Waldo Emerson reminds us, "What lies behind us and what lies before us are tiny matters, compared to what lies within us."

In Unit Seven, participants will be learning how to mirror for positive change. Remind them that in the course of the program they have mirrored regularly. How should they mirror in their community work? Observe people and feed back to them their strengths. Send them appreciative notes identifying the ways they used their strengths or share observations after the meeting or by phone. Once you begin to do this, it becomes a natural habit. You will be asking participants to "mirror" in the activity: You as a Leader.

Developing a Personal Mission Statement and Goals to Reach It

Now that participants have reviewed the lessons learned throughout the course and reflected upon their unique gifts, talents, and contributions, they will be asked to write a personal mission statement and accompanying goals and share with one or more in the group. This is highly personal and may be emotional as well. This is when people have to be honest with themselves about what they are actually willing to do. This will require you to give plenty of latitude and support for creating honest and authentic statements. You do not want people to feel that they must write something more than what they can or are willing to do.

As with the mission statement of a company, a personal mission should reflect the values, passions, and ideas dear to the individual. A mission can help us make decisions about our activities. We are all pressed for time, we all feel stretched—we are stressed. There are so many wonderful opportunities to give and share and do. How do we decide what to do or not to do? How do we develop a balanced life? A personal mission can guide, direct activity, and provide freedom from frenetic activity. Recognizing our gifts and talents is important, but it is only the first step. How we use our gifts and talents is the crucial part of congruency and realizing our leadership potential.

Louis Schmier, a professor in the Department of History at Valdosta State University, discovered, "the real, painful, hard truth that if I want to change the world, I have to start with myself. All change is internal change. Every decision comes from within me." He continues that this realization led him on a long search for a sense of mission. He claims that he knew he had finally found his mission when he had a "deep, very deep, sense of fulfillment. You know, fulfillment comes from realizing and living by your values. Fulfillment comes from integrity, from being who you are and expressing who you are as fully as possible. Fulfillment is living my personal mission."

For each participant the process to develop a personal mission will take a different path— and will probably require a different impetus or set of questions. Leadership Consulatant Andy Fleming, writing for college students who are wrestling with the question, what makes for a well-lived life, shares these questions for consideration:
- What do I like to do?
- What am I good at doing?
- What needs to be done in the world that I can use my skills to make a difference?

You may use these questions to jump-start participants who have difficulty with this exercise.

Celebration

The group has worked hard and made a significant commitment of time, intellect, emotion and risk. They have evolved from a disjointed (and possibly distrusting) collection of individuals into a cohesive unit with a shared understanding and drive to facilitate leadership in their communities.

Without losing their individuality, they have formed a team (or several smaller teams) that is able to combine each person's strengths for the good of the community as a whole.

Plan in advance to build some sort of celebratory activity into this closing day's activities. Some programs may be able to sponsor a dinner at an exclusive restaurant. Others may invite participants' family members at the end of the day to meet the people with whom their loved one has shared so much time. Still others may issue certificates or give "gag awards" to participants exhibiting unique attributes during the program. The scale of the celebration is not so important as is the acknowledgement of a difficult job well done. Be sure to reward yourself and other facilitators, volunteers, presenters, etc. (if applicable) for your hard work and commitment to the program.

Growing and Celebrating as Leaders

Learning Objectives:

- Develop personal mission, goals, and action plan
- Understand and tie together all that has been learned
- Celebrate leadership learning experience

Other Purposes of the Session:

- Evaluate personal growth as a servant leader
- Debrief the project and/or advocacy group experience
- Celebrate the group and the relationships formed

Questions to be Addressed:

Questions for Personal Reflection

- Why is it that people get so excited at training sessions but then do not do anything differently when they go back home?
- How has servant leadership been internalized in behavior and attitude?
- What do I now believe about working with others?
- What are my personal passions and interests?
- How am I going to try to impact my community?
- What is my personal responsibility to my community now that I have had the privilege of this leadership learning experience?

Questions for Group Reflection

- How are we going to impact our community?
- What have we learned about performing groups that we can use with our families, in the workplace, and in the community?
- How can we balance our desire to help the community with the needs of family and personal time?
- How will we as a group sustain the energy and motivation we feel at this time?

Before the meeting (facilitation supplies and materials needed):

Team Facilitation

Facilitators who work in pairs (which is recommended) should look through the day and determine who will be the speaker and who will be the recorder/support person for each activity.

Wall Charts

- Wall of Personal Missions (will be filled in during the session)
- The Best Test of Servant Leadership
- Tool Box with capacities filled in
- Timeline or Community Vision Developed in Unit Three
- Others as appropriate

Handouts

- Overview for Participants
- Participant Agenda
- Handout #1 Thought Starters for Building Your Personal Mission
- Handout #2 First Steps to Realizing Our Vision

Supplies

- Flip charts
- Non-permanent Markers
- Blank Paper
- Pens
- (Optional) Stationery and envelopes
- (Optional) Certificates or gifts for class members

Creating the environment

Suggested Theme

For this session, you could use the idea of gifts. Boxes wrapped as gifts, mirrors—anything that calls attention to the idea of celebrating gifts and talents. If you use this—or any—theme, be sure to discuss it with the class. Ask what symbolism they see in the theme elements.

If there have been photographs, press clippings or other mementos of the class sessions so far, it would be meaningful to display them during this session. This helps mark the occasion but also may remind class members of experiences and insights they have had leading up to this final session.

Room Setup

Tables with 4-6 people set up so that it is easy for the participants to converse. Cover tables with bright colored paper, extra markers, an agenda for each participant and a quote at each person's place (See Appendix A).

Session Script

Session Overview

Welcome and Overview	15 minutes
What We Have Learned About Facilitative Leadership	45 minutes
What Have We Learned as We Worked With Others: How Did Our Teams Work?	45 minutes
Break	**15 minutes**
You as a Leader	15 minutes
Developing a Mission and Goals	45 minutes
Break	**15 minutes**
Changing Our Community—First Things First: Creating our Plans	45 minutes
Time for Celebration and Group Reflection!	30 minutes
Total Time	**4 hours 30 minutes**

As People Enter
30 Minutes

Materials: Sheets of paper (colorful or with decorative borders) with one participant's name per sheet, markers

Post sheets of paper with participants' names on them around the room. Ask each participant to write on his or her paper three gifts and/or talents he or she brings to the leadership table.

   Then, ask class members to write gifts and talents they see in others on their respective sheets. Participants should write on as many other sheets as possible. There will be more time to do this during the first break later on in the day.

Welcome and Overview
15 minutes

Why: To set the stage for this session.

How: Present the topics to be discussed today.

Learning Objectives:
- Develop personal mission, goals, and action plan
- Understand and tie together all that has been learned
- Celebrate leadership learning experience

Other purposes of the session:
- Evaluate personal growth as a servant leader
- Debrief the project and/or advocacy group experience
- Celebrate the group and the relationships formed

Suggested questions:
- What ah-ha's or insights have you had since the last session?
- In what ways have your advocacy plans started real-life action?
- Now that you have the personal network built through this class, how will you use your fellow participants as resources in the future?

Take time to explain any logistical issues (meals, traveling, facility, etc.) and introduce any visitors/key people that haven't previously attended. Give details of a class project or separate class celebration event, if one is planned.

What We Have Learned About Facilitative Leadership
45 Minutes

Materials: Flip charts, non-permanent markers, pens, and paper

WHY: To reflect on what we have learned.

HOW:

1 Discuss this question in a small group: If you wrote a book on facilitative leadership, what would you include?

2 Come back together in a large group. Call out and record participants' responses on a flip chart.

3 Ask participants: *After hearing other people's responses, has your group's answer changed in any way?*

The rest of the day, participants will reflect on small-group process and then focus on their personal development.

What Have We Learned as We Worked With Others: How Did Our Teams Work?
45 minutes

Materials: Flip charts, non-permanent markers, pens, paper

WHY: Evaluating a team's progress is an imperative and ongoing process for any group. Too often groups forget to evaluate their process and focus only on the final outcome.

If your class is doing projects in teams, break into those groups. If not, ask participants to get into the same groups as they were in Units Five and Six.

HOW:

❶ In project groups, have participants debrief the entire project experience. Have participants examine: what was accomplished, how the team worked together, how the team moved through chaos, how the group settled differences, how the group made sure everyone participated, how free people were to express their ideas.

❷ Each team should make a chart of what they did for each of the Steps to a Performing Community. They should list capacities and processes that were used and how. They should indicate what might have been done to make the process more effective.

❸ After in-depth discussions, each team should report back to the whole group what they have learned about working on a team: what worked, what didn't work, what lessons they will take to their next group experience.

❹ Record what has been learned about working on a team.

❺ A useful application question if you have time: *Consider a group you are currently working in, what lessons did you learn from this project experience that you think might make a difference there?*

As you go to break, remember to write gifts and talents you see in others on their respective sheets located around the room.

Break	*(15 Minutes)*

You as a Leader
15 minutes

WHY: As leaders it is important to reflect on personal questions:
- What do I bring to the table?
- How do I use my gifts and talents?
- What is my personal mission?
- What are my goals for future leadership?
- How can I impact my community?

HOW:

❶ Encourage participants to gather at tables in small groups of three or four.

❷ Give each person their sheet of paper from the first activity of the day. Give people time to study their lists and absorb how others see them.

❸ Have each person share his/her list with the rest of the small group. What was surprising? What pleased them?

❹ On a new sheet of paper, ask participants to reflect on what they learned about their gifts and talents—realizing that they have much to offer to the community.

Developing a Mission and Goals
45 minutes

Materials: Handout #1—Thought Starters for Building Your Personal Mission, pens and paper

Why: To create a first-draft personal mission that can guide future service and future leadership. Suggesting that it is a draft relieves many from feeling that the statement has to be perfect.

How: Discuss the importance of a personal mission. Say something like:

Personal mission statements based on correct principles are like a personal constitution, the basis for making major, life-directing decisions and the basis for making daily decisions in the midst of the circumstances and emotions that affect our lives. Your personal mission can help define which boards you serve on, what you do with your leisure time and what kind of a boss you will be.

Creating a mission statement isn't something most of us can do in half an hour. But if we start writing a draft now, you can continue to refine it in the coming weeks and years.

❶ Have participants work individually.

❷ Provide Handout #2–Thought Starters for Building Your Personal Mission to guide the individual work. (You may also/instead provide one of the alternate personal mission worksheets that follow this script or substitute another approach with which you have experience.) (Use about 30 minutes for steps 1 and 2).

❸ Upon completion of mission, each person should find a partner and share their statement. Encourage them to work together to refine their statements. Each person should print his or her draft mission on a nice sheet of paper and place it on a Wall of Personal Missions. (about 15 mins)

GOALS

❹ Once we know what our mission is, we can set our goals. Invite each person to write down two to five personal goals consistent with his or her new personal mission.

❺ Ask participants to refer back to the class vision for the community developed in Unit Three as a part of the timeline experience. Ask them to think about what they want to accomplish as community leaders to contribute to the shared vision.

Break
(15 Minutes)

Changing Our Community— First Things First: Creating our Plans

45 minutes

WHY: This activity is designed to help participants develop their action steps while identifying others in the group who have similar interests.

HOW:

1 Say: *With a partner, discuss what you want to do first in moving toward accomplishing your newly developed goals. These action plans should be workable and identify other people who can help accomplish the goals.*

Participant Handout #2—First Steps Toward Realizing Our Vision

2 Each person should put his or her plans on a copy of Handout #2–First Steps Toward Realizing Our Vision.

3 Ask class members to sit in a circle. Having the class vision for the community on the floor in the center, or at least visible, will make a powerful statement.

4 Ask all participants to share their mission, goals and action plan. Place plans on the floor in the center of the circle as each participant finishes sharing.

5 When all have reported there will be many action plans in the circle. Have participants write their name on any project they would like to help with. There may be projects that fit together.

To debrief, ask questions such as:
- What is the value for leaders to identify and work out of their personal missions?
- What new opportunities for working together came out of this process?
- Which step (mission, goals, actions) was hardest? Which was most rewarding?

Time for Celebration and Group Reflection!

30 minutes

Materials: Flip charts and non-permanent markers; pens; (optional) certificates or gifts for class members; (optional) stationery and envelopes

WHY: Celebrations are an important part of leadership. Too often we forget to celebrate our accomplishments.

HOW: Here are some ideas for celebration. Add your own or ask the group for suggestions.

1 Group Reflection: Let the group discuss (either in the large group or in small groups depending on the atmosphere) what they learned about themselves and what has changed because of this leadership experience.

2 If you are not holding a separate class celebration or graduation event, invite the class (or several small teams) to use this time make a creative presentation describing their experiences in this leadership class. You will get some wonderful presentations, and

your class will depart motivated to make your community a better place to live. See
the Unit Six Extras and Additional Materials for more information.

3 Give certificates or mementos to acknowledge members' accomplishments.

4 Provide stationery and envelopes and give class members time to write thank-you
notes to employers, sponsors, family members, speakers or other people who contrib-
uted to the success of the class or individuals' ability to take part. These notes could
include some explanation of what the writers learned in the class and how they plan to
use it.

5 Mainly, celebrate the conclusion of the program and the positive changes that will be
occurring.

Thought Starters for Building Your Personal Mission

Answering these questions honestly will help you to think about living purposefully. Consider writing some short answers, then reviewing them in a week. Over time, you will refine your thoughts and begin to set a mission that will lead you to the outcomes you desire in life.

What do I believe is the purpose of my life?

Am I fulfilling my meaning in life through my work?

In my current position, am I contributing to the quality of human life by helping others realize their special purpose?

"What lies behind us and what lies before us are tiny matters, compared to what lies within us."

—Ralph Waldo Emerson

What am I willing to commit myself to and act on at this moment in my life that will give me satisfaction and some legacy for the future?

What are the ideals, values, or character traits that are of greatest importance in my life? Arrange them in the order of priority. Place an asterisk next to those items you are willing to take action on immediately, even if it would be difficult.

Write a sample purpose statement that will guide and keep you focused on your preferred future.

Remember: Having a purpose statement is a powerful tool! But the tool will only be as good as your commitment and willingness to make the preferred future a reality. From this point forward, your purpose will take commitment, personal energy, action, and continual reflection for course corrections.

First Steps Toward Realizing Our Vision

You are already involved in your community in a variety of ways, including serving on work groups, coalitions, task groups, in churches, and in other volunteer positions. Think for a few minutes about your goals for achieving the shared vision of your leadership class. Where will you start, and what will you do first?

Your name:_____

Group(s) or person(s) you will work with: _____

What you plan to do: _____

_____

_____

_____

_____

_____

_____

_____

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_____

Unit Seven Extras and Additional Materials

If you want more context ...

Additional or alternate handouts

Unit Seven Alternative Handout #1 Personal Mission and Unit Seven Alternative Handout #2 Covey Personal Mission are two additional approaches to developing a personal mission statement. The first handout may be a simpler process that would appeal to people who are less reflective, to youth and to groups that don't have very much time to work on personal mission. The Covey approach (the second handout) may appeal to those who want to know "what the experts say," or to those whose workplaces already use Covey approaches. If there is a Covey-certified trainer in your community (or your class!) it may be an opportunity for the class to be introduced to that resource. These handouts follow this section.

Suggested time: 15 minutes as an addition, 45-60 minutes as an alternate approach

So You Think You Want to Serve on a Board?

It is likely that your class members are already veterans of non-profit boards, and it is also likely that as a result of the leadership class experience, class members will be more interested in serving on boards. It may serve the class well to discuss the legal and functional responsibilities of non-profit boards. Community foundations, United Way and United Fund organizations are resources that can help with this, as are online resources such as boardsource.org and ccsr.wichita.edu. A starting place may be a class discussion of Unit Seven Alternative Handout #3 Effective Boards. This handout follows this section.

Suggested time: 20 minutes

Nominate the Next Class

Ask the class to think about its vision for the community, the skills and capacities introduced in the leadership class, and the usual and unusual voices in the community. With that perspective, ask each class member to nominate or suggest one to five people who should be invited into the next

leadership class. Supply sticky notes or index cards, and ask class members to record the nominees' names, contact information, if they know it, and a little about the nominees.

Suggested time: 15 minutes

If you want to increase knowledge of/ interaction with the community …

Education

Invite a high school or university guidance counselor or career placement advisor to speak to the class. Ask the speaker to discuss how personal mission and interests influence career choice and also to forecast what in the employment landscape will change in the coming years. If possible, have the speaker provide assessments to help class members identify and narrow their interests and strengths.

To debrief, ask such questions as:
- What are we doing to help young people in our community find career opportunities that reflect their interests and gifts?
- For people who are in mid-career, what insights did this provide?
- What did this discussion suggest for you as you consider community service and volunteer opportunities?

Suggested time: 45 minutes

Business Applications

Invite a human resources professional to speak to the class about how companies identify, nurture and reward talent. What skills and work habits are local companies looking for in employees? What do they have a surplus of? What needs are anticipated in the future? What opportunities are there for people who want to change careers? What lessons from business human resource practices can non-profit and volunteer organizations learn?

Suggested time: 30 minutes

If you want an energetic activity …

Leadership Olympics

- Set an Olympic ambiance. Make paper doves from sticky-backed paper and hang them from the ceiling. Create a fake Olympic torch out of rolled up paper. Hang hula hoops to represent the Olympic rings.
- Give class members practice at coming up with themes by asking them to create and host the "Leadership Olympics." Divide the class into teams. Each team will first create a competitive (but fun) event based on something they learned or that happened in your class. Each team

will then host and act as judges for the event it planned and compete in the events other teams create

Suggested time: 90 minutes or out-of-class activity.

Dear Abby

- Give the class experience with looking to one another for feedback and help with the problems they encounter in their community work with the "Dear Abby" exercise. (Depending on the age of your audience, you may wish to substitute some other advice columnist.)
- Divide the class into groups, and ask each group to develop a Dear Abby letter:
  - Select a table facilitator, recorder, and spokesperson.
  - As a table group, discuss and select the toughest challenges you have faced as facilitative leaders in the community.
  - Select and write up the group's agreed-upon toughest challenge as a Dear Abby letter and sign it in a typical Dear Abby format (e.g., Lonely in Louisiana). Don't forget to include a story to illustrate the issue(s).
- Say: *You will deliver your group letter to another group when instructed, so when you are finished writing your letter, wait for instructions before "delivering" your letter. You will also receive a letter from another group.*
- When all letters are created, have groups exchange them and then follow these instructions to craft a response:
  - Discuss and list the critical issues contained in the letter.
  - Brainstorm response(s) to the critical issue(s).
  - Draft a nonjudgmental response listing the critical issue(s) you have identified and your best strategy(ies) for managing the concern(s).
  - Remember to make your response sound like a gentle Dear Abby reply.
  - Focus more on what can happen in the future and less on what "should" have happened in the past
  - Refer to facilitative leadership tools and capacities when possible
- The spokesperson should be ready to read the Dear Abby letter your group received and your table's reply to the group.

Suggested time: 45 minutes

If you want to ask more questions …

Questions to use in debriefing sessions, opening or closing circle

- Questions for Personal Reflection
  - Why is it that people get so excited at training sessions but then do not do anything differently when they go back home?
  - How has servant leadership been internalized in behavior and attitude?
  - What do I now believe about working with others?
  - What is my personal passion and interests?

- How am I going to try to impact my community?
- What is my personal responsibility to my community now that I have had the privilege of this leadership learning experience?

- Questions for Group Reflection
  - How are we going to impact our community?
  - What have we learned about performing groups that we can use with our families, in the workplace, and in the community?
  - How can we balance our desire to help the community with the needs of family and personal time?
  - How will we as a group sustain the energy and motivation we feel at this time?

Suggested time: 30 minutes

If you want to connect the topic to the class project(s) …

Next Steps for Class Project(s)

If the class project extends beyond the final class session, ask the class or project teams to create an action plan defining what steps remain, who will do what by when, and future meeting times. If appropriate, provide a copy of the plan to the sponsor, the organization being served by the project or other people who will help keep the group accountable.

Suggested time: 30 minutes

Report on Class Project(s)

As part of the closing circle or, if you have one, the class celebration/graduation event, ask a representative of the class (or each team) to report on the class project(s). The report should include:
- What project was selected?
- Whom does it benefit?
- What actions have taken place?
- What still remains to be done?
- How will success be measured?
- How will participants and sponsors be recognized?

Encourage the reporter to be creative and consider using photos or video of the project team in action.

Suggested time: 30 minutes or out-of-class activity

Personal Mission Statement

- A statement of personal purpose
- Usually one sentence in length and explains:
  ◦ Whom you serve
  ◦ What you do
  ◦ Why you do it
- Easily understood by anyone
- Unique to you—based on your talents, skills, passions, values, experiences
- Based on these assumptions:
  ◦ Everyone is here for a purpose
  ◦ It is better to be clear about that purpose than unclear

Examples of personal mission statements:

Lincoln—"Preserve the Union"
FDR—"End the Depression"
Nelson Mandela—"End Apartheid"
Mother Teresa—"Show mercy and compassion to the dying"
Joan of Arc—"Free France"
Nehemiah—"Rebuild the walls of Jerusalem"

To develop your personal mission statement as a facilitative leader, answer the following:

I will do (action): _____

_____

_____

_____

_____

_____

_____

_____

For whom (do I serve): _____

_____

_____

_____

_____

_____

_____

So that (result of my action): _____

_____

_____

_____

_____

_____

_____

Based on your answers, develop a first draft of a personal mission statement as a facilitative leader:

_____

_____

_____

_____

_____

_____

_____

Personal Mission Statement: Stephen Covey's Approach

A personal mission statement is based on habit 2 of *The Seven Habits of Highly Effective People* called "begin with the end in mind." One effective way to begin with the end in mind is to develop a personal mission statement, philosophy or creed.

In one's life, the most effective way to begin with the end in mind is to develop a mission statement one that focuses what you want to be in terms of character and what you want to do in reference to contribution of achievements. Writing a mission statement can be the most important activity an individual can take to truly lead one's life.

Personal mission statements based on correct principles are like a personal constitution, the basis for making major, life-directing decisions, and the basis for making daily decisions in the midst of the circumstances and emotions that affect our lives.

In order to write good mission statements, we must first begin at the very center of our circle of influence, that center comprised of our most basic paradigms, the lens through which we see the world. Whatever is at the center of our life will be the source of our security, guidance, wisdom, and power.

As we go deeply within ourselves, as we understand and realign our basic paradigms to bring them into harmony with correct principles, we create both an effective, empowering center and a clear lens through which we can see the world. We can then focus that lens on how we, as unique individuals, relate to that world.

Creating a mission statement is not something you do overnight. It takes deep introspection, careful analysis, thoughtful expression, and often many rewrites to produce it in final form. It may take you several weeks or even months before you feel really comfortable with your mission statement, before you feel it is a complete and concise expression of your innermost values and directions. Even then, you will want to review it regularly and make minor changes as the years bring additional insights or changing circumstances.

Your mission statement becomes your constitution, the solid expression of your vision and values. It becomes the criterion by which you measure everything else in your life.

Some suggestions in creating a mission statement may be:

1. Write down your roles as you now see them. Are you satisfied with the mirror image of your life?
2. Start a collection of notes, quotes, and ideas you may want to use as resource material in writing your personal mission statement.
3. Identify a project you will be facing in the near future and apply the principle of mental creation (see text for details). Write down the results you desire and what steps will lead you to those results.

Learn more about this approach at www.stephencovey.com

Effective Boards

Ten Basic Responsibilities of Nonprofit Boards

Determine the Organization's Mission and Purpose

- A statement of mission and purposes should articulate the organization's goals, means, and primary constituents served. It is the board of directors' responsibility to create the mission statement and review it periodically for accuracy and validity. Each individual board member should fully understand and support it.

- **Select the Executive**
  Boards must reach consensus on the chief executive's job description and undertake a careful search process to find the most qualified individual for the position.

- **Support the Executive and Review His or Her Performance**
  The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization. The chief executive, in partnership with the entire board, should decide upon a periodic evaluation of the chief executive's performance.

- **Ensure Effective Organizational Planning**
  As stewards of an organization, boards must actively participate with the staff in an overall planning process and assist in implementing the plan's goals.

- **Ensure Adequate Resources**
  One of the board's foremost responsibilities is to provide adequate resources for the organization to fulfill its mission. The board should work in partnership with the chief executive and development staff, if any, to raise funds from the community.

- **Manage Resources Effectively**
  The board, in order to remain accountable to its donors, the public, and to safeguard its tax-exempt status, must assist in developing the annual budget and ensuring that proper financial controls are in place.

- **Determine and Monitor the Organization's Programs and Services**
  The board's role in this area is to determine which programs are the most consistent with an organization's mission and to monitor their effectiveness.

- **Enhance the Organization's Public Image**

  An organization's primary link to the community, including constituents, the public, and the media, is the board. Clearly articulating the organization's mission, accomplishments, and goals to the public, as well as garnering support from important members of the community, are important elements of a comprehensive public relations strategy.

- **Serve as a Court of Appeal**

  Except in the direst of circumstances, the board must serve as a court of appeal in personnel matters. Solid personnel policies, grievance procedures, and a clear delegation to the chief executive of hiring and managing employees will reduce the risk of conflict.

- **Assess Its Own Performance**

  By evaluating its performance in fulfilling its responsibilities, the board can recognize its achievements and reach consensus on which areas need to be improved. Discussing the results of a self-assessment at a retreat can assist in developing a long-range plan.

Appendices

Appendix A: Useful Quotes

One way that facilitators can effectively reinforce a message or add a new perspective is the use of quotations. Consider writing quotes on flip chart paper or poster board and hanging them around the room; adding quotes to agendas and handouts; or putting quotes on small multi-colored cards that can be sprinkled on tables.

These suggested quotes are arranged in order of the seven units for reference, and then under topic headings. You may find that many of the quotes, however, are illuminating on many different topics. And, naturally, add your own or new suggestions from class participants.

Unit One

New Leadership

"Leadership must come from new and diverse sources, and its practice must take a radically different form."
    –David Chrislip

"Effective leadership is a relationship rooted in community."
    –Lee Bolman, Terrence Deal

"I define leadership as an activity, not as a set of personality characteristics. It is the mobilization of the resources of a people or an organization to make progress on the difficult problems it faces."
    –Ron Heifetz

"Discovery consists of looking at the same thing as everyone else and thinking something different."
    –Albert Szent Gyorgyi

Twenty-first Century Communities

"The areas that thrive in today's fast paced, ever-changing world, have visions for themselves, are forward-thinking, are willing to change and indeed are looking to change—to continue to grow."
    –Jack Schultz

"The only way … for our community to be a better place to live is for the people of the community to understand and accept their personal responsibility for what happens."
    –*Davis Merritt, Jr.*

"Community development, or community building, depends on identifying, developing and sustaining relationships. Central to being successful in those relationships is community leadership."
    –*Center for Collaborative Planning*

"Relationship building is a way of looking at the world—not just a strategy."
    –*Robert Putnam*

Servant Leadership

"Our real freedom comes from being aware that we do not have to save the world, merely make a difference in the place where we live."
    –*Parker Palmer*

"A leader is not someone who loves to run others, but someone who carries the water for his/her people so they can go on with their job."
    –*Robert Townsend*

"Enter to learn; depart to serve."
    –*Mary McLeod Bethune*

"When we cast our bread upon the waters, we can presume that someone downstream whose face we will never know will benefit from our action, as we who are downstream from another will profit from that grantor's gift."
    –*Maya Angelou*

"Be Someone for Somebody."
    –*Mother Teresa*

"Everybody can be great because everybody can serve."
    –*Dr. Martin Luther King, Jr.*

"Servant leaders begin by asking: How can I help? Whom can I serve? And then they see ways to serve by leading."
    –*Jane Fryar*

"Servant leadership describes a process of inner growth and outer consequences."
    –*Don Frick*

Unit Two

Relationships

"The better the personal relationship, the greater the trust and rapport between people."
–Jerry Acuff

"The conversation is not about the relationship. The conversation is the relationship."
–Susan Scott

"Community development, or community building, depends on identifying, developing and sustaining relationships. Central to being successful in those relationships is community leadership."
–Center for Collaborative Planning

"Relationship building is a way of looking at the world — not just a strategy."
–Robert Putnam

Learning Styles

"We stretch to understand each other and are invigorated by the stretching."
–Anne Morrow Lindberg

"The real voyage of discovery consists not in seeking new landscapes, but in having new eyes."
–Marcel Proust

"Everyone comes with certain gifts—but not the same gifts. True participation and enlightened leadership allow these gifts to be expressed in different ways and at different times."
–Max DePree

Stories

"Facts bring us to knowledge, but stories lead us to wisdom." –Rachel Remen, M.D.

"The secret of heaven: that each affects the other and the other affects the next, and the world is full of stories, but the stories are all one."
–Mitch Albom

Listening

"To listen well we must set aside memory, desire and judgment."
–Wilfred Bion

"Listening means taking in, not taking over."
–Michael Nichols

"Listening is an art that requires openness to each other's uniquenesses and tolerance of differences."
    –Michael Nichols

Servant Leadership (in relation to topics in this unit)

"We strengthen life any time that we listen generously or encourage someone to find meaning, or wonder about possibility, or dream or hope or ... know that they matter."
    –Rachel Remen, M.D.

"Think as little as possible about yourself and as much as possible about other people."
    –Eleanor Roosevelt

Unit Three

General Leadership

"I define leadership as an activity, not as a set of personality characteristics. It is the mobilization of the resource of a people or an organization to make progress on the difficult problems it faces."
    –Ron Heifetz

"Times of stress and difficulty are seasons of opportunity when the seeds of progress are sown."
    –Thomas F. Woodlock

Vision

"Visions stay on paper unless people make them happen."
    –Mary Jo Clark, Pat Heiny

"A visionary is a self-fulfilling prophet. Don't predict the future. Create it!"
    –Leland Kaiser

"Vision without action is daydreaming, but action without vision is just random activity."
    –Joel Barker

Timeline

"The world is changing like a kaleidoscope right before our eyes."
    –Marian Wright-Edelman

"The deeper the roots the taller the tree. The more you know about history, the more you can see into the future."
    –Johnnetta B. Cole

Creativity

"If we are to make ourselves more fully available to the unfathomable potential of our whole mind, we must unmuzzle the genius of the right brain."
–Gordon MacKenzie

"If we want people to be innovative and creative, leaders must engage them in meaningful issues."
–Margaret Wheatley

Conversation

"Common spaces for commonplace encounters are prerequisites for common conversations and common debate."
–Robert Putnam

"Very great change starts from very small conversations, held among people who care."
–Margaret Wheatley

"At the very heart of leadership—indeed, in its very soul—is the art of conversation, the ability to create a dialogue that others will willingly join."
–David Whyte

Servant Leadership (in relation to topics in this session)

"We develop courage for those things that speak to our heart. Our courage grows for things that affect us deeply, things that open our heart."
–Margaret Wheatley

"It is those with the boldest dreams who awaken the best in all of us."
–Johnnetta B. Cole

"Leaders need to imagine what had been unimaginable before."
–Suzanne Morse

"A leader today needs to be one who convenes people, who convenes diversity, who convenes all viewpoints in processes where our intelligence can come forth. So these kinds of leaders do not give us the answers, but they help us gather together so that together we can discover the answers."
–Margaret Wheatley

Unit Four

Working Together

"Getting people together takes more than getting them in the same room."
–Jim Rowings, Mark Frederic

Collaboration

"Those who lead collaborative efforts—transforming, facilitative servant leaders—rely on both a vision of leadership and new skills and behaviors to help communities and organizations realize their visions, solve problems, and get results."
    –David Chrislip

Teams

"Alone we can do little, together we can do so much."
    –Helen Keller

"A team is a group of people who believe in and are committed to the value of working together in a spirit of cooperation where information is shared and decisions are mutually decided upon."
    –Purdue University Cooperative Extension Service

"All real teams share a commitment to their common purpose. But only exceptional teams become deeply dedicated to each other."
    –Katzenbach & Smith

"Most of us at one time or another have been part of a great 'team', a group of people who functioned together in an extraordinary way—who trusted one another, who complemented each other's strengths and compensated for each other's limitations, who had common goals that were larger than an individual's goals, and who produced extraordinary results ... the team that became great didn't start off great—it learned how to produce extraordinary results."
    –Peter Senge

Chaos

"This messy stage doesn't last forever, although it can feel like that. But if we suppress the messiness at the beginning, it will find us later on, and then it will be disruptive."
    –Margaret Wheatley

Unit Five

Inclusivity and action:

"Our best moments as a society come when we get outside ourselves and accept a common purpose that is larger than projected self-interest."
    –Tom Ehrlich

"The more we pull together toward a common future, the less it matters what pushed us apart in the past."
    –Johnnetta B. Cole

"We must create wholeness out of diversity and embrace our differences as well as our commonality."
  –John Gardner

"New voices revive our energy, and oftentimes help us discover solutions to problems that seem unsolvable."
  –Margaret Wheatley

"The greater the difference in thinking, the more creative the solution will likely be."
  –Patricia Hughes

Change & Change Agents

"A knowledge of the path cannot be substituted for putting one foot in front of the other."
  –M.C. Richards

"Moving when the time is right takes foresight, wisdom, and courage. When you combine all three you have the ingredients to be proactive and to put yourself and your community ahead of the game."
  –Jack Schultz

"People love change when it is shaped by them, when they are in control of it, when it is their chance to make a difference. In fact, then they don't even call it 'change' – it's a project, a venture, a dream come to life. It's their passion turned into a professional pursuit."
  –Rosabeth Moss Kantor

"Change begins when people in a community decide that they need one another in order to solve a common problem that is too great to ignore."
  –Carolyn Farrow-Garland

Collaboration

"Collaboration is a process to reach goals that cannot be achieved acting singly and is a means to an end, not an end in itself."
  –Center for Collaborative Planning

Vision

"A visionary is a self-fulfilling prophet. Don't predict the future–create it."
  –Leland Kaiser, Ph.D., Health Care Futurist

"You've got to think about big things while you're doing small things, so that all the small things go in the right direction."
  –Alvin Toffler

"Your vision must be bold and audacious and big enough to encompass and embrace much of the needs of all of humanity — then you can never fail."
    –Andrew Young

"Vision without action is daydreaming, but action without vision is just random activity."
    –Joel Barker

Wisdom/Learning Cycle

"True change must grow out of people's experiences."
    –Cecile Andrews

"How we decide is as important as what we decide."
    –David Chrislip

"Successful action gives people lessons in their own power."
    –Robert Putnam

"Something fundamental changes when people begin to ask questions together—they go beyond the normal stale debate about problems that passes for strategy in many organizations."
    –E. Vogt, J. Brown, D. Isaacs

"The purpose of evaluation is not to fix blame; it is to find out what we have to do next."
    –David Mathews

Unit Six

Taking Action

"It is common sense to take a method and try it. If it fails, admit it frankly and try another. But above all, try something."
    –Franklin D. Roosevelt

"It is surprising what a man can do when he has to, and how little most men will do when they don't have to."
    –Walter Linn

"It is time for us all to stand and cheer for the doer, the achiever—the one who recognizes the challenge and does something about it."
    –Vincent Lombardi

"I've found that luck is quite predictable. If you want more luck, take more chances. Be more active. Show up more often."
    –Brian Tracy

Planning and Beginning

"A good plan implemented today is better than a perfect plan implemented tomorrow."
   –*George S. Patton*

"A journey of a thousand miles must begin with a single step."
   –*Lao Tsu*

"A leader takes people where they want to go. A great leader takes people where they don't necessarily want to go, but ought to be."
   –*Rosalynn Carter*

Doing Things Larger than Yourself

"A man is the sum of his actions, of what he has done, of what he can do, nothing else."
   –*Mahatma Gandhi*

"Trust only movement. Life happens at the level of events, not of words. Trust movement."
   –*Alfred Adler*

"We should be taught not to wait for inspiration to start a thing. Action always generates inspiration. Inspiration seldom generates action."
   –*Frank Tibolt*

"Action is eloquence."
   –*William Shakespeare*

"A barking dog is often more useful than a sleeping lion."
   –*Washington Irving, adapted from a verse in the Bible*

"I do not believe in a fate that falls on men however they act; but I do believe in a fate that falls on man unless they act."
   –*G.K. Chesterton*

Looking for Solutions

"Success will never be a big step in the future, success is a small step taken just now."
   –*Jonathan Martensson*

"We cannot do everything at once, but we can do something at once."
   –*Calvin Coolidge*

Unit Seven

Commitment

"Voicing our intentions is often part of becoming clear about and making a commitment to action."
    –*Oriah Mountain Dreamer*

"How wonderful it is that nobody need wait a single moment before starting to improve the world."
    –*Anne Frank*

Purpose

"Our primary task in life is to discover and define our life purpose and then accomplish it to the best of our ability."
    –*Christina Baldwin*

"Everyone has inside himself a piece of good news. The good news is that you really don't know how great you can be, how much you can love, what you can accomplish, and what your potential is."
    –*Anne Frank*

"Only when one is connected to one's own core is one connected to others."
    –*Anne Morrow Lindbergh*

"Our real freedom comes from being aware that we do not have to save the world, merely make a difference in the place where we live."
    –*Parker Palmer*

"So the point is not to become a leader. The point is to become yourself, to use yourself completely—all your skills, gifts and energies—in order to make your vision manifest."
    –*Warren Bennis*

"We're all here for a purpose. Meditate on your mission and then use your gifts and talents to live your life on purpose. In doing so, you'll become an unending magnet of miracles."
    –*Tavis Smiley*

Action

"What we think, or what we know, or what we believe is, in the end, of little consequence. The only thing of consequence is what we do."
    –*John Ruskin*

"The highest reward for man's toil is not what he gets for it, but what he becomes by it."
    –*John Ruskin*

"Action is the antidote to despair."
    –*Joan Baez*

Mirroring

"When we think about leaders and the variety of gifts people bring to corporations and institutions, we see that the Art of Leadership lies in polishing and liberating and enabling those gifts."
　　–Max DePree

"There's something I know about you that you may not know about yourself. You have within you more resources of energy than have ever been tapped; more talent than has ever been exploited; more strength than has ever been tested; and more to give than you have ever given."
　　–John Gardner

Final Circle

"A journey of a thousand miles begins with a single step."
　　–Lao Tsu

Learning & Debriefing

"Whenever two or more people are gathered together for a purpose there is an opportunity for leadership."
　　–James Hunter

"You did what you knew how to do and when you knew better you did better."
　　–Maya Angelou

"Engaging people in learning new public ideas and practices is nothing short of a journey; there is no easy fix."
　　–Richard Harwood

"When we reflect deeply and honestly, when we subject our actions to thoughtful examination, when we act with purpose, not whim or thoughtlessness, we imbue our actions with meaning. I believe this balanced rhythm is the essence of a life lived with grace."
　　–Bernice McCarthy

Servant Leadership

"The role of a leader is a very high calling."
　　–James Hunter

"So I asked myself, will my footprints be deep enough to guide the children who follow me?"
　　–Bishop Kenneth Hicks

"If your actions inspire others to dream more, learn more, do more, and become more, you are a leader."
　　–John Quincy Adams

"The foundation of twenty-first century leadership is a belief in living servant leadership, personal mission and twenty-first century capacities. Once these are internalized and have become second nature, you are transformed and are able to assist others in the transformation process."

    –KCLI #1 Participants

Community Leadership Curriculum Tools Summary Reference Table

This table provides an overview of tools introduced in the community leadership curriculum, including the general purpose of the tools and where the tools might each be useful within the context of the Steps to a Performing Community framework. The "how" the tools can be used is intentionally absent beyond the general purpose, as the tools are designed to be flexible and adaptive to the audience for which they are intended.

Gathering		
Tool	**Purpose**	**Unit (s)**
Steps to a Performing Community • Steps to a Performing Community • Characteristics of a Performing Community	These tools help provide a framework and an understanding for how groups in community settings come together and perform their work.	1, 2
Experiential Learning Cycle • Experiential Learning Cycle	Also known as the Wisdom Cycle, this is a tool for looking at the learning process from concept introduction through application.	1
Reconnecting • Setting Up the Learning – Purposes of Reconnecting	Many participants learn best if, in preparation to an experience, they reconnect personally with other participants and understand the purpose and desired outcome of the learning activity.	2

Gathering		
Tool	**Purpose**	**Unit (s)**
Learning, Thinking, Working Styles • Learning Styles Overview of Appropriate Use • Learning Styles Inventory • Learning Styles Inventory Definitions • Learning, Thinking, Working Styles Egg • Planning a Party Small Group Activity • Learning, Thinking, Working Styles Stretching Egg • Learning, Thinking, Working Styles How we take in Information • Learning, Thinking, Working Styles How we use Information • Learning, Thinking, Working Styles The Whole Picture • Learning, Thinking, Working Styles Working with Others	Developed by David Kolb, these tools help: • those working in groups to identify how they take in and use information. • provide insight into understanding the strengths and challenges for each of four learning, thinking, working styles. • identify individual group member's strengths and how those can be capitalized upon in a group or team setting.	2
Servant Leadership • The Best Test of Servant Leadership • New Approaches to Facilitative Leadership	Robert Greenleaf's writings outline an approach to leadership in which the leader first serves and in serving, leads. The handouts referenced here reflect Robert Greenleaf's work and this perspective on leadership.	1, 3

Chaos		
Tool	**Purpose**	**Unit (s)**
Appreciative Leadership • Appreciative Inquiry: Asking Powerful Questions • Appreciative Inquiry: Constructing and Asking Powerful Questions • Rating my Facilitative Leadership Behaviors • Facilitation from the Side of the Room	Appreciative Leadership is an approach to leadership using a "what is working well/imagining what might be" perspective. These tools: • provide information about the appreciative inquiry process, what constitutes a powerful question and how to structure one using careful construction, scope, and assumptions. • illustrate the relative power of questions. • suggest questions that can be used for focusing attention, for unifying ideas, and for creating forward movement. • help to identify and assess community needs and assets already in place to build upon.	1, 3, 4
Visioning • Seeing the World with New Eyes • Consensus Decision Process • Bridge Building Exercise • Drawing the Preferred Vision for the Future	These tools provide: • a visioning process that helps groups to first expand thinking and consider all of the possibilities. • various approaches to visioning. • outline the qualities and characteristics of visionaries.	

Consensus
 	
• Consensus Decision-Making Process
• Tools for Reaching Consensus
  ◦ List Reduction
  ◦ Voting with dots
  ◦ Multi-voting
  ◦ Payoff Matrix
  ◦ Nominal Group Process
• Small Change Activity
	These tools provide processes and approaches to building consensus and setting priorities as a next step after visioning.	4

Story Telling • Listening & Telling our Stories – Building Trust	The popular Margaret Wheatley quote suggests that you cannot hate someone whose story you know. Genuine listening helps create bridges to greater understanding and builds trust.	2

Chaos		
Tool	**Purpose**	**Unit (s)**
Creativity • Vision as inspiration for creativity • Exploring Creative Problem-Solving and Different Perspectives • Who's at the Table? Activity • Using Social Capital to Build Effective Communities and Create Change	Adopting creativity stretches a person's perspective and increases options and possibilities for visioning and problem-solving within a group. Creativity is not just about artistic gifts.	3, 5
Role Playing • Role Playing a Meeting	Role playing is an opportunity for participants to view a situation from another perspective in a dynamic process.	6
Personal Mission • You as a Leader Activity • Developing a Mission and Goals • Approaches to Developing a Personal Mission	A personal mission should reflect the values, passions and ideas dear to an individual leader. Personal mission can help individuals identify how to best use their gifts, talents and time.	7

Unity		
Tool	**Purpose**	**Unit (s)**
Collaboration • Collaborative Premise Checklist • Stages of Collaboration • What Factors Make or Break Collaboration	These tools help consider various aspects of collaboration and collaborative partnerships, including: • elements vital to collaboration. • processes for identifying the right stakeholders and when to form collaborative partnerships. • assessments to evaluate collaborative partnerships. • processes to enhance collaboration once partnerships have been formed.	5
Coalition Building • Team-building Olympics • Building a Coalition for Change Activity – using Learning Styles	Practicing coalition building allows participants to consider how to work together and advocate for change. Attending to how to intentionally build a coalition from it's onset, including identifying individual members' strengths, is critical to the successes accomplished by the coalition.	4

Unity

Tool	Purpose	Unit (s)
Action Steps • First Steps toward Realizing Our Vision	Action steps built on personal mission provide a guide and a roadmap for how to achieve the mission. Without action, vision is really just a great idea that never goes anywhere.	7

Performing

Tool	Purpose	Unit (s)
Advocacy • Advocacy Strategies • Gaining Media Attention • Key Decision Makers Chart • Tips for Framing Effective Messages • Building a Case for Change • Choosing Collaborative Responses	• These tools and resources are the key elements that comprise a successful advocacy campaign.	6
Closing/Debriefing • Summarizing the Learning –Purposes of Closing/Debriefing • Debriefing the Entire Class Experience • Connecting Experience to Steps of a Performing Community • Supporting Debrief Questions for Further Reflection	Related to the experiential learning cycle, debriefing is the opportunity to optimize learning, make new connections and bridge the classroom experience to real world action.	2, 7
Celebration	To generate energy for further work, effective groups celebrate milestones, accomplishments and risks taken.	7

Performing		
Tool	**Purpose**	**Unit (s)**
Tool Box • Tools Summary Table • Blank Facilitation Guide Planner	These tools are associated with curriculum development for community leadership programs and facilitations and provide: • an overview summary of each tool and its general purpose introduced during the KCLI III sessions. • a facilitation planner that can be customized to outline the details of a facilitation or community leadership program session, including who is facilitating what aspect, how much time is allocated and related process notes.	All

Sustaining Action	
Tool	**Purpose**
Civic Engagement & Social Capital • Lecturette Notes	These notes summarize the concepts discussed during the session on civic engagement and social capital.
Advocacy • Definition Handout	This definition of advocacy provides an alternative perspective for community leaders to consider when undertaking advocacy efforts that are different from traditional advocacy approaches (e.g., lobbying).