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# WELCOME













Welcome to Rockwood Leadership Institute's Virtual Art of Leadership! We look forward to many years of collectively working toward equity, social transformation, and the common good.

On behalf of all of us at Rockwood, we hope that you find your time with us engaging, thought-provoking, joyful, challenging, and satisfying. Since our founding in 2000, we have distilled some of the best practices and most grounded perspectives in the field of leadership, and have incorporated them into the work you will do over the next six weeks.

Our hope is that your experience is both inspirational and practical. The Art of Leadership is anchored in core principles and methodologies that we have found useful over time. The concepts, worksheets, tools, and information in this workbook are designed to serve as a reference and a resource to be used during the Art of Leadership, as well as within your daily work and personal life. We hope that it will be useful to you in the days and years to come.

We've worked hard to meet the diverse needs of an ever-evolving community and we value your feedback. Our goals are to grow and nourish our network of social change leaders, to create more collaborative cross-movement programs, and to amplify stories that demonstrate and inspire cross-pollination and unpredictable collaboration. Please feel free to contact us with ideas, questions and suggestions.

Thank you for taking the time this week to be the leader you wish to see in the world.

DARLENE NIPPER

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# YOUR COMMITMENT AS A LEARNER

We request that all VAOL participants attend all facilitated live discussions regularly and arrive at the start of the session. If you are absence for more than 20% of the live discussion time, you will need to withdraw. We will work with you to determine if you want to find another set of dates for participating in the VAOL.

If you are more than 15 minutes late for the start of a session or leave the live session before the last 5 minutes of the session on three or more instances, that is counted as an absence.

#### Participant commitment required:

Approximately 4 hours a week, including 2 hours of real-time, live group webinars per week, plus 2-3 hours of individual 'asynchronous" work (readings, video-watching, journaling, worksheets)

#### Live work includes:

Being fully present for a two-hour interactive webinar with 1-2 trainers and other participants. This would include presentations by the trainers, offering questions and comments in the chat, and participating in breakout groups of 3-5 people.

## "Asynchronous" work includes:

- Watching: watching 1-2 weekly trainer videos (5-15 min each) setting the context, linking that week's topics to current events/issues, introducing key concepts and frameworks, and giving instructions for the work that week
- Watching videos of other alums/leaders sharing stories or insights specific to that week's topic (specifically recorded for Rockwood or publicly-available TED-like talks)
- Reading: short articles/text
- Writing: completing worksheets; some solo journaling
- Participating: reading and responding specific questions posed by the trainers, responding to others and building on others' ideas on Slack channel
- Scheduling and meeting virtually (phone or Zoom) with 1-2 assigned partners in similar time zones for a longer discussion or exercise (eg. Courageous Conversations, or POP coaching)

## PRE-WORK

## FOR WHITE, MIXED RACE AND BIPOC PARTICIPANTS

Over the years we have found, that many White participants may be unaccustomed to working and learning in multi-racial circles. For participants for whom this is true, or who are new to deep racial equity work, we strongly recommend a few short readings and videos that will support your learning experience and readiness to learn in a diverse, multi-racial environment. Before our first live session, or posting on our online dialogue forum, please watch and read the preliminary resources below.

For Mixed race and BIPOC identified participants, the resources offered here can be helpful in providing language for our lived and community experiences. The resources below illuminate a myriad of systemic and structural dynamics we all experience but do not always name day to day.

- 1. WATCH VIDEO [4:08]: The roots of privilege and marginalization go back many generations, often leading to cumulative impacts that can be hard to see in any current snapshot of reality. Here's one simple frame for recognizing this: Equal Opportunity Race: <a href="https://www.youtube.com/watch?v=vX Vzl-r8NY">https://www.youtube.com/watch?v=vX Vzl-r8NY</a>
- 2. **READ [about 15 min]:** Even the most progressive organizations are operating within the larger economic, social and cultural context of a dominant culture where White behaviors and norms are seen as "just how things are done". Long-time educators Kenneth Jones and Tema Okun created this short but powerful work documenting those norms, and proposing antidotes likely to be more inclusive: <a href="https://rockwoodleadership.box.com/s/8fx4oufbx5u9lpllcfvikebciagcubcz">https://rockwoodleadership.box.com/s/8fx4oufbx5u9lpllcfvikebciagcubcz</a>
- 3. WATCH VIDEO [7 min]: The ability to give and receive feedback skillfully is an essential leadership skill, and will be explored in this training. However, many White participants, are not accustomed to receiving feedback about and across race. White educator Dr. Robin Dingelo offers important insights about why white people have such difficulty talking about race, which points to the important work White leaders have in strengthening their resilience in receiving and responding to race-based feedback with courage and grace: <a href="https://www.youtube.com/watch?v=kzLT54OjclA">https://www.youtube.com/watch?v=kzLT54OjclA</a>

## PRE-WORK (CONT'D)

- 4. **READ [About 15 min]:** "Detour Spotting" (lists 20 common defensive/deflective behaviors): <a href="https://culturalbridgestojustice.org/detour-spotting/">https://culturalbridgestojustice.org/detour-spotting/</a>
- 5. READ AND/OR WATCH [20 35 min]: "But I'm oppressed too?!

But I'm oppressed too! Complexities of class, gender and other social identities" The term "intersectionality" was coined by Dr. Kimberlé Williams Crenshaw in 1989 to describe the impacts of multiple layers of oppression, historic and current, faced by Black people in particular.

Here's her original article: https://philpapers.org/archive/CREDTI.pdf

And here's her 18-minute TED talk: https://www.ted.com/talks/kimberle\_crenshaw\_

the\_urgency\_of\_intersectionality#t-5621

# **PURPOSE & OUTCOMES**

# Purpose of AOL training is to offer a transformational opportunity to:

• Strengthen your leadership to help you create more effective, sustainable, humane lives and organizations.

## Outcomes of AOL training for participants are:

- Connection to your purpose and vision
- Increased effectiveness through communication, powerful feedback and courageous conversations
- Insights as to the impact your leadership has on others
- Increased resilience in the face of challenge
- Relationships that will support you for a lifetime of activism and service
- Skills to lead from a healthy and sustainable approach

# THE 6 PRACTICES

**LEADERSHIP:** The ability to inspire and align others tosuccessfully achieve common goals

Rockwood's leadership programs are organized around a fundamental set of leadership practices that can serve as the basis for a lifetime of leadership growth.

## The 6 Practices of Leadership are:



#### **PURPOSE**

To live and lead from that which gives our life meaning



#### VISION

To create and articulate a clear and compelling picture of our desired future



#### **PARTNERSHIP**

To build and maintain strong interdependent relationships that advance our vision



#### **RESILIENCE**

To shift from reactivity to a state of resourcefulness in moments of stress and crisis



### **PERFORMANCE**

To enhance our capacity to produce results that further our vision



#### PERSONAL ECOLOGY

To maintain balance, pacing and efficiency to sustain our energy over a lifetime

## **AGREEMENTS**

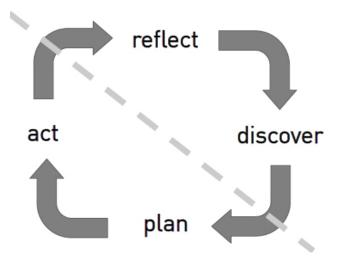
- 1. Agreements: Be on time. Be here at all sessions. Stay present (avoid multitasking). Speak from "I". Respect confidentiality. Share the airtime.
- 2. Emphasize "Presence": The ability to stay present is an essential leadership skill. And it can be even more challenging in a virtual environment, where it's easy to check out. Throughout our calls together, we'll invite you to really stay fully present
- 3. We want to hear from and include everyone. This will require each of us to move forward and back consciously contributing to the inclusion of everyone.
- 4. Unclear agreements = major communications breakdown

## ADULT LEARNING CYCLE

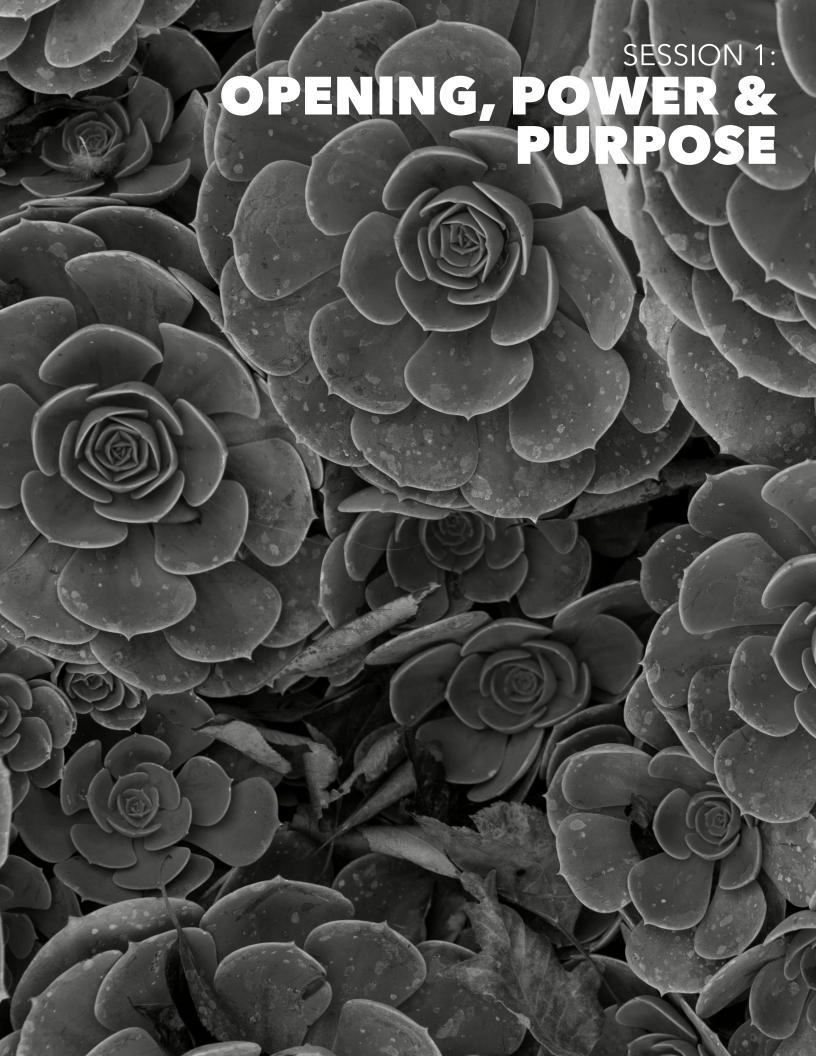
We live in a dominant culture with a strong bias toward activity, where people need to be seen in constant motion in order to feel, and be perceived as being, productive. This cultural tendency can be even stronger with those who self-identify as "activists" - people that act! But 'busyness' does not necessarily translate into 'effectiveness'. In order to be truly effective, leaders adapt to complex and shifting experiences, and strive to continually learn and grow.

Leaders benefit from a full cycle of being that certainly does include action. And ideally, that action is followed by a period of relatively neutral *REFLECTION*, where one steps outside of the fray to ask: What just happened? What do I notice? What were the results? Then, from that stance of neutral observation, we ideally shift to *DISCOVER*: what worked well, and might be preserved? What might be done differently? What course-corrections, if any, might I consider? From there, one shifts to *PLAN*: what might my next step be? By when? What support might I need?

For this virtual learning environment, this is how each week (and even each live seminar) will go: some action, some reflection, discovery, then planning for the next step or application of what we've just learned.



- **Reflect**: Make time to "look back". Recognize what worked, what didn't work and what can be improved.
- **Discover**: Include voices other than just your own, as well as other new information; what do you know now that you didn't know then?
- Plan: Decide what you want from the new learning and create strategies to apply it.
- Act: Implement new learning from a place of commitment for producing desired results.



# I AM FROM

Purpose: To increase our capacity as a "change maker", through increasing our own self-awareness around the issues of belonging and intersectionality.

### Objectives:

- Provide an opportunity to connect the heart (our lived experiences) to our daily work.
- Recognize how our narrative informs and impacts how we function and move in the work.
- Build deeper connections.

#### Process:

You will craft your own personal narrative to share with a small group.

- You are simply telling your own story; do not overthink
- Concentrate on the thoughts and feelings that come to mind when you reach a prompt; just write as it comes to you
- A minimum of 4 lines per prompt is required
- Please complete the worksheet on the following page before our first live session on Week 1. We will share our narratives in small groups in that first session.

## I AM FROM (CONT'D)

PROMPTS
I am from (familiar sights, sounds, or smells of your neighborhood)
I am from (familiar foods)
I am from (family sayings, traditions, influence / power structures, birth order)
I am from (schools, churches, government and other institutions present in your life)

# **SOURCES OF POWER**

- 1. **PERSONAL POWER:** grounded in energy, vision, ability to communicate, capacity to influence, emotional intelligence, charisma, psychological savvy, etc.
- 2. **CO-POWER:** the commitment to, and process of, intentionally lifting up the power of those around us, including your own personal power, through modeling, validating and providing feedback.
- 3. **COLLABORATIVE POWER:** comes from our ability to join and align energy in partnership with others. May be in pairs, teams, organizations, communities, coalitions and movements. It is collective power derived from authentic inter-relationships.
- 4. **POSITIONAL POWER:** a product of organizational authority, hierarchy, status or position. It is often unseen by those with the power, and is usually obvious to those without it.
- 5. **EXPERT POWER:** comes from wisdom, knowledge, experience and skills (e.g. someone is widely respected because of their skills as an organizer, or because they have many years of experience).
- 6. CULTURAL POWER: the norms, manners, language, values, morals, history and ancestry often upheld by media and other dominant institutions. This can be an expression of conditioning and privilage regarding race/sexual orientation/class/gender/age. As with positional power, this is often invisible to the dominant group. To those with less power, it is often clear, real and lived. From the perspective of under-represented communities, cultural power can be a consciousness and connection to culture that serves to empower.
- 7. **REFERRED POWER:** comes from connections to others (e.g. a staff member without formal positional power may have power based on their long-term relationship with the executive director).
- 8. **OBSTRUCTIVE POWER:** stems from the ability to oppose, coerce or block. Can be implicit, threatened or demonstrated; those without other sources of power may depend on it (e.g. non-violent social action sit-ins, filibusters, etc.) Many activists are experts in its use.

## SOURCES OF POWER (CONT'D)

- 9. **IDEOLOGICAL POWER:** comes from an idea, vision or analysis. Victor Hugo wrote, "Nothing can withstand the power of an idea whose time has come." It can be an original idea of an individual, or an ideal such as "democracy," "liberation," or "justice."
- 10.**INSTITUTIONAL POWER:** is economic, legal and political power directly wielded by institutions (e.g. corporations, the military, police departments, or by one of your organizations). This power exists apart from the individuals who work there at any one time- it is derived from name recognition, membership, skills, resources, etc.
- 11. **STRUCTURAL POWER:** is covertly or implicitly exercised through the dominant systems and institutions of society. (e.g. the resistance to alternative medicine from the AMA & insurance providers; racism expressed and maintained through policies of red-lining by lending institutions).
- 12.**TRANSCENDENT POWER:** comes from a connection to something greater than oneself. Can be derived from a lived connection to spirit, nature, history, lineage, etc.

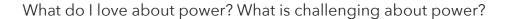
## POWER AND LEADERSHIP

### Instructions: After you've read through the "Sources of Power":

<ol> <li>Pt</li> </ol>	'ut an a	asterix (*)	beside the	sources	vou use	most	often
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- 2. Put a (!) beside those your organization uses most often
- 3. Put a (?) beside those you'd like to explore accessing more

Then reflect on these questions:
----------------------------------



How do I feel about the power I have?

What is my intention for how I will use my power over the next 6 weeks?

As organizational leaders and change agents, we need to learn to engage with different sources of power. This training focuses particularly on personal power, co-powering, collaborative power, and building institutional power (stronger teams and organizations). All of these, and more, are sources of power that will help you '… inspire and align others to successfully achieve common goals.'



## PURPOSE AND LEADERSHIP

What is Purpose? Purpose answers the question Why? Why am I here? What is the unique contribution I am here to make? When we, as leaders, can access our own sense of purpose, it offers so many gifts:

- 1. Purpose gives meaning to our lives
- 2. Purpose is a source of energy and courage, that can sustain us when we're weary, and keep us going when we encounter obstacles. Change agents often fight battles against seemingly overwhelming odds, with too much to do and too few resources purpose can be an almost inexhaustible storehouse of fuel
- 3. Purpose is our source of inspiration that can support the deep inner alignment needed to succeed. Nearly 2500 years ago, Sun Tzu recognized this when he said:

"Purpose is the motivating force for achievement. When you are doing something which serves your purpose, you are at your best."

4. Purpose provides us direction and a compass by which to guide our actions. It's our "North Star", and can help us identify what to say "Yes" to, and what to say "No" to; connecting to our purpose can be a vitally important element for discerning how we spend our life force, as we strive for balance and wellbeing over time.

Discovering and then living into our purpose is not always easy. Sometimes the barriers to us living our full purpose are internal. Dancer and choreographer Martha Graham offers this wisdom:

"There is a vitality, a life force, an energy, a quickening, that is translated through you into action. And because there is only one of you in all time, this expression is unique. If you block it, it will never exist through any other medium and will be lost. The world will not have it. It is not your business to determine how good it is, nor how it compares with other expressions. It is your business to keep the channel open."

Most of us cannot easily access a personal 'mission statement' that fully embodies our purpose. We don't make our purpose... we discover it. We each have a purpose, but may go through many periods when it is unclear or unfocused, or when we feel disconnected.

For some it can be one clear statement of a fundamental mission; for others, purpose may be a constellation of principles regarding our purpose. In the 13th century, the Persian poet Rumi offered guidance for discovering our purpose when he wrote,

"Everyone has been made for some particular work, and the desire for that work has been put in every heart. Let yourself be silently drawn by the stronger pull of what you really love."

Think for a moment of what you really, truly love - not just what you like. Remember those moments when you have felt most passionately and deeply that you are doing, saying or feeling something "on purpose." These may be signs you're in the territory of your purpose.

# **PURPOSE**

# To live & lead from that which gives our lives meaning

## **QUOTES**

As a leader, you have chosen to play an important role in guiding your organization into the future. An essential component of true leadership is having clarity about your personal purpose in life, allowing you to create better clarity for the purpose and vision of any organization of which you are a part. Following are a variety of quotes to inspire you:

"Purpose is the motivating force for achievement. When you are doing something which serves your purpose, you are at your best. We cannot use what we learn without the fire of purpose in our hearts."

- Sun Tzu

"Purpose is the reason an organization exists. Its definition & articulation must be top management's first responsibility. Every individual extracts the most basic sense of purpose from the personal fulfillment he or she derives from being part of an organization. If corporate ambition begins to focus on the company's narrow self-interest, it eventually loses the excitement, support and commitment that emerge when objectives are linked to broader human aspirations."

- Harvard Business Review Article

"There are three truths: My truth. Your truth. And The truth."

Chinese Proverb

## QUOTES (CONT'D)

"My life is my message."

- Mahatma Gandhi

"The primary force that drives my work is a passionate desire to to be good ancestor. My purpose is to help create change, facilitate healing, and seed new possibilities for those who will come after when I am gone."

- Layla Saad, author, "Me and White Supremacy" (2019)

"Every single one of us has a sacred purpose in life by the mere fact of our being born. From the time we come out of the womb until the time we leave this planet our journey is to simply be present to every moment of our lives as it unfolds."

- angel Kyodo williams

"Every few years you should check in on your development. See if you are clearer, more loving than a few years ago. If you are making progress, good. Keep working and don't think about it for a few more years."

- The Dalai Lama

"Above all, the Rosa Parks and the Vaclav Havels and the Nelson Mandelas and the Dorothy Days of this world are authentic. These are people who have come to understand that no punishment that anybody could lay on us could possibly be worse than the punishment we lay on ourselves conspiring in our own diminishment, by living a divided life, by failing to make that fundamental decision to act and speak on the outside in ways consonant with what we know to be true on the inside."

- Parker Palmer

"Do you have the patience to wait till your mud settles and the water is clear? Can you remain unmoving until the right action shows itself?"

Lao Tsu

"When we are really honest with ourselves, we must admit that our lives are all that belong to us. So, it is how we use our lives that determines what kind of people we are. It is my deepest belief that only by giving our lives do we find life. I am convinced that the truest act of courage, the strongest act of humanness, is to sacrifice ourselves for others in a totally non-violent struggle for justice."

Cesar Chavez

## **ON FREEDOM**

from the autobiography of Nelson Mandela

"I was born free... Free to run in the fields near my mother's hut, free to swim in the clear stream that ran through my village, free to roast mealies under the stars... It was only when I began to discover as a young man that my freedom had already been taken from me, that I began to hunger for it. At first, I wanted freedom only for myself, the transitory freedom of being able to stay out at night, read what I pleased and go where I chose. Later, I yearned for the basic and honorable freedoms of achieving my potential, of earning my keep, or marrying and having a family - the freedom not to be obstructed in a lawful life.

"But then I slowly saw that not only was I not free, but my brothers and sisters were not free. I saw that it was not just my freedom that was curtailed, but the freedom of everyone who looked like I did. That is when I joined the African National Congress, and that is when the hunger for my own freedom became the hunger for the freedom of my people. It was this desire for the freedom of my people to live their lives with dignity and self-respect, that transformed a frightened young man into a bold one, that drove a law abiding attorney to become a criminal. That turned a family-loving husband into a man with no home. That forced a life-loving man to live as a monk...

"It was during those long and lonely years that my hunger for the freedom of my own people became a hunger for the freedom of all people, black and white. I knew as well as I knew anything that the oppressor must be liberated just as surely as the oppressed. A man who takes away a man's freedom is a prisoner of hatred, he is locked behind bars of prejudice... Both are robbed of their humanity. When I walked out of prison, that was my mission, to liberate the oppressed and the oppressor both... Some say that has now been achieved, but I know that is not the case. The truth is we are not yet free; we have merely achieved the freedom to be free...

"I have walked that long road to freedom. I have tried not to falter. I have made missteps along the way. But I have discovered the secret that after climbing a great hill, one only finds that there are many more hills to climb... I can rest only a moment, for with freedom come responsibilities, and I dare not linger, for my long walk is not yet ended."

excerpted from Long Walk to Freedom:
 The Autobiography of Nelson Mandela, 1995

# **PURPOSE PAIR QUESTIONS**

[Name], what gives you joy? (ask 3x)			
[Name], what gifts do you bring? (ask 3x)			
[Name], what gives your life meaning? (ask 3x)			

# **PURPOSE STORIES**

Think back to a moment in time where you were living fully from a sense of purpose. Where are you? What scents, colours, feelings to you notice? Who is there? What is happening?
In your small group, during our live session, describe that moment in time when you were fully living from a place of purpose.

# **PURPOSE JOURNALING**

Please use these questions to help you identify important lessons. Write freely, without editing or censoring, as if your heart could speak its innermost feelings directly through your fingers and hand, onto the paper.

1) What is the story of your purpose?
2) What are examples of phrases, images, statements that capture this purpose?
3) Identify a few words, a symbol, an image or phrase that reflects your own sense of purpose.

# PRACTICING: STAYING CONNECTED TO MY SENSE OF PURPOSE

How do you stay connected to your sense of purpose? What are longer-term, as well as in-the-moment, practices that you use or have seen other effective leaders use, to regularly revisit and tap in to this essential source of fuel and discernment?

Here are some examples that other leaders have shared over the years as practices to (re-) connect to Purpose:

- Keeping a photo or quote literally beside one's desk for in-the-moment "re-sets"
- Imagining an image, phrase or physical posture that immediately connects to the feeling of being 'on-purpose'
- Doing a daily meditation practice
- Keeping a daily journaling practice
- Writing one's "purpose statement" on a post-it note, or on one's screensaver, for a constant quick reminders
- Prayer or mindful contemplation
- Maintaining an 'altar' or 'inspiration table' of inspirational objects and images
- Time in nature, being on the land
- Time spent with community members in one-on-one organizing conversations
- Time with children or elders
- Looking at artwork or inspirational imagery
- Doing art or movement
- Singing
- Listening to inspirational music
- Reading poetry or other inspirational writings

Q:	What are your top 1-3 practices that support a longer-term connection to purpose?
Q:	What are your top 3 practices for in-the-moment connection to purpose?

Please share at least one of these practices with the cohort on this week's Discussion Forum!

# **WEEKLY QUESTIONS**

## FOR INDIVIDUAL REFLECTION

1	What am I	learning	about my	strengths a	as a l	eader?
١.	vviiat aiii i	1Carring	abouting	, энспань (	as a i	Caucii

2. What am I learning about my areas for development as a leader?





To create and articulate a clear and compelling picture of our desired future.

## CREATING THE FUTURE

#### **VISION STAND PREPARATION NOTES**

You will prepare and deliver a 2-minute presentation on what you plan to create as a leader within a specific time frame. This can be a vision for an organization, for a project, or a personal vision for your life. If you are in transition, you might choose to create a vision for yourself in this time of transiton. (eg. What 'success' looks like when you've made the shifts in your life and self-care

#### **VISION STANDS WILL ADDRESS**

•	What I plan to create as a leader in the next	(time frame - usually 1-3
	years)	

The vision of what will be so, if I am successful in my work

The following workbook pages will guide you through some other key questions in preparing your vision stands.

## VISION PREPARATION NOTES (CONTINUED)

If y	If you need more room, use the note pages at the end of the workbook.				
•	What will be so in	time? What is your overall BIG vision?			
•	Why is this on purpose for you,	what is in it for you, for others?			
•	What are 2-3 key activities or cri	tical points we should know about your vision?			
•	What is the difference your visio	on will make for you, your community, the world?			

# VISION STAND INSTRUCTIONS

You will be presenting your stands in our live session, to a small group of peers.

You'll get feedback from your peers in your breakout room based on your vision stand, on your strengths and areas for development, in 3 areas:

- 1. Presence: believe s/he is really here, fully present, sharing their purpose & passion?
- 2. Clarity: do you get a clear picture not of just activities, but what will be qualitatively different in world? Could you give 1-min summary to someone else?
- 3. Credibility: do you believe s/he can pull it off? has s/he got strength & competence to achieve vision?

#### Notes:

- Each person has 2 minutes to share their vision. Please ensure at least 1 person is keeping time time is a resource, and if people go over time, they take the time of others. And... do try to use your whole 2 minutes!
- Please pause and centre. Breath. Say your name and begin. No preamble, apologies:)
- At 2 minutes, please finish. Listeners: say "thank you".
- Pause: 30 seconds for listener's notes

Name:	Presence	Clarity	Credibility	
Comments:		•	·	
Name:	Presence	Clarity	Credibility	
Comments:		,	,	
	Presence	Clarity	Credibility	
Comments:				

Name:	Presence	Clarity	Credibility	
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#### ON FEEDBACK

#### WHEN GIVING FEEDBACK

- Come from a sincere desire to help support this person and their leadership.
- Have positive intent
- Be direct and specific
- Focus the feedback on what you saw and/or heard that communicated presence, clarity and credibility
- Share the impact this had on you
- Hold a high standard: Take the moment during their presentation (or sometimes even during the applause) when the fullest expression of that person's humanity and leadership shone forth

#### WHEN RECEIVING FEEDBACK

- Come from a sincere desire to benefit and learn from the perspective of others
- Listen with positive intent
- Stay open
- Really strive to hear the feedback
- Avoid the tendency to explain, defend, or justify your actions
- Ask questions only to clarify or confirm what you are hearing, not to challenge.
   Keep asking yourself, "How is this like life? Where else have I show up like this?
   What can I learn?"
- Any one person's feedback may be more about them and their lens than about you But watch especially for the patterns of feedback
- Thank each person for their attention and in sights

# INSTRUCTIONS FOR FEEDBACK BREAKOUT GROUPS

Each person will receive about 5 minutes of direct, loving feedback aimed at strengthening their leadership. What a gift!

#### LISTENERS/RECEIVERS:

- Avoid explaining, defending, deflecting just take it in. Feel free to take notes on the next page on what you hear.
- To stay present, you may ask for someone to 'scribe' when it's your turn to receive feedback. They can enter it in the chat for you, and you can copy and paste before the group ends. Otherwise, use the space below/next page to take notes
- Please avoid, defending, agreeing, deflecting or otherwise speaking during this time it is a precious gift to receive feedback. Take it in. When your turn is done, say "thank you"

#### SPEAKERS/FEEDBACK-GIVERS:

- Please be kinds, direct, and specific. Please be timely to leave room for other speakers.
- ALL: Please make sure someone keeps time in the group.

# VISION STAND FEEDBACK FROM OTHERS

**YOUR NOTES:** 

# PERSONAL REFLECTIONS ON VISION STAND FEEDBACK

What was it like to receive feedback on your vision stand?
Where might that feedback reflect feedback you've received elsewhere as a leader?

# **FUTURE TRAVEL JOURNAL**

# PURPOSE, OUTCOMES, & PROCESS

#### P.O.P. – A Clear Path Forward

The best way to be sure that you are focused and aligned in any planning or decison making process is to start by taking the time to carefully and articulate the fundamentals:

- PURPOSE involved ("Why is this important?");
- **OUTCOMES** to be created in support of our **vision** ("What do we most need to accomplish?");
- PROCESS to be used ("How will we accomplish the outcomes/achieve our vision?").

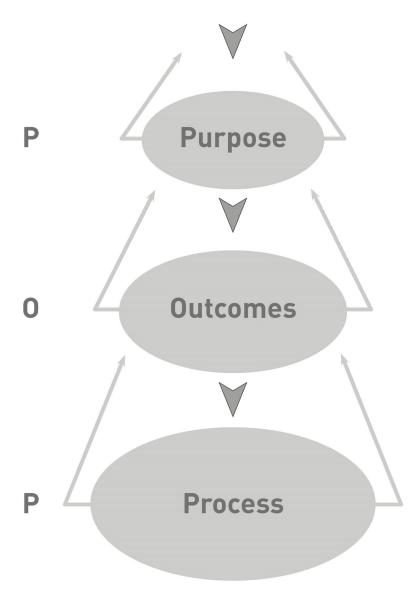
We always begin with making sure we are clear on purpose. From this clarity, we create a vision of the outcomes we want to create. Only then can we create a process or plan to begin the work of moving purposefully toward a desired future.

- Answering the "Why?" question is critical for engaging people's caring and commitment (without which people's best thinking is seldom engaged).
- Answering the "What?" question is critical for aligning expectations and focusing attention (without which a lot can get said and even done but little accomplished).
- Answering the "How?" question is critical in preparing people to engage and participate appropriately, enabling a swifter, more focused accomplishment of the outcomes.

A common mistake people make is to decide or act before being really clear on the answers to these three questions. This reveals our shared impatience with thought and bias toward activity. But when it comes to people and perfomance, you often have to start slow to go fast. Once a solid context for action has been set, it is easier to make appropriate choices as well as to prepare for (and respond more quickly to) unexpected contingencies.

#### P.O.P. (CONTINUED)

As shown in the model below, each layer of the POP model is subordinate to the one above it. If at any point there is confusion or uncertainy in people's minds, the best response is to work your way back up the model and recheck the quality of the linkages and alignment involved.



Using this model, what you create is a shared "map" by which:

- Individuals can more quickly and effectively make good decisions;
- **The team** (group, organizations, etc.) can coordinate efficiently, ultimately reaching the targeted destination together.

\*POP Model developed by Randall J. Alford and Leslie Sholl Jaffe. Used with permission.

# THE VISION I WANT TO BRING FORWARD

• P: (Purpose) Why is this important?

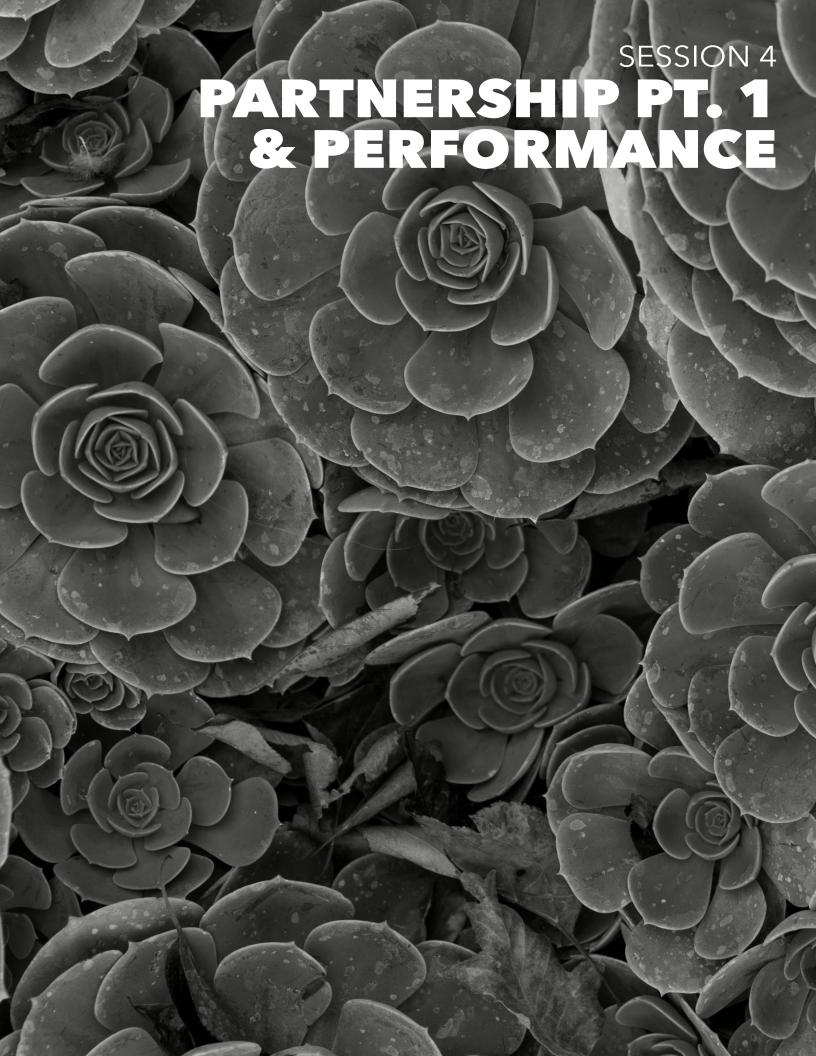
• O: (Outcome) What I'd like to see...

• P: (Process) How I will go about manifesting..

# **WEEKLY QUESTIONS**

#### FOR INDIVIDUAL REFLECTION

What am I learning about my strengths as a leader?
What am I learning about my areas for development as a leader?



# **PARTNERSHIP**

# To build and maintain strong interdependent relationships that advance our vision

"My leadership, as well as the leadership of other native women, is measured by the value it has for others in our communities, its relevance for whom it works. So words like community and concepts like "kinship", "grandma" and "aunt" are not antithetical to words like "leadership" and "power". In fact, in our communities, I believe these words are the equivalent of it. Power belongs to those who give. Power belongs to those who give it away."

- Rayna Green, Cherokee Nation cultural historian & activist

#### Partnership and Leadership

Leaders who respect & care for their people are more effective than those who rely on positional power:

We believe that personal power has limits. We're certain that collaborative power will change the world. Capitalism and white supremacy are profoundly focused on individualism above all. Yet the most effective leaders think less about "what I can do", and more about creating conditions in which others can be successful. That is why effective partnership skills are essential to effective leadership.

The absolute foundation of partnership is: Presence.

Research demonstrates that people can tell if you're present vs. thinking about the next item on your to-do list. We invite leaders to build the cultural awareness so that they can be deeply present and connected to someone, even if they have very different life experiences and perspectives - and even if you disagree with them.

How might you be very present with someone and have profound differences in your thinking? What are the signals or behaviors that let's people know you are very present and able to hold the cultural, political and social differences with respect and appreciation?

# ON PRESENCE AND ACTIVE LISTENING

#### Try this reflection:

Remember an experience you've had of really NOT being attended to by someone; a particular experience that stands out of someone really not being present with you. Go back to a specific time and place. What's happening? Where are you? Who is it that's not being present? What does it feel like? What happens to you in the presence of someone like this, who isn't present, isn't attending?

Now remember an experience you have had of really being attended to by someone, an experience of someone really being present with you. Go back to a specific time and place. Where are you? What's happening? Who are you with? And what does it feel like for you? What's it like when someone really attends to you?

So much of what we heard from hundreds of leaders doing this reflection is how much more whole, creative, energized, and connected they feel. And one of the ways such presence is practiced is through active listening.

#### **ACTIVE LISTENING**

#### **DEFINITION**

"Active Listening is attending carefully to what another person says, means, intends, and feels - and responding in a way that lets them know that they are heard and understood" - Tom Peters, Thriving on Chaos

Although some active listening skills are verbal, we are going to concentrate on the non-verbal aspects.

#### **Active Listening Skills:**

- Paying attention to your body posture and position engaged non-verbal body language is open and neutral
- Making **eye contact** (when appropriate cultural diversity)
- Intentional **non-verbal acknowledgements**: head nods, hmmm, uh-huh
- Paraphrasing: Let speaker know statement was understood
  - The listener briefly restates in their own words the core of what they think the speaker has communicated
  - Go after the speaker has completed the thought don't interrupt
  - If you disagree, indicate that you have heard by reflection and then state your disagreement
- **Summarizing:** Highlight central messages to facilitate agreement or discover areas of disagreement
- Acknowledging: Allow speaker to talk about feelings
- **Encouraging:** Ask for more information to show that listener is interested (works with non-verbal attending skills)
- **Supporting:** Short verbal words or non-verbal gestures to encourage listener
- **Delegating:** Elicit ideas that the speaker might have to solve a problem

# SOCIAL IDENTITY, POWER AND LEADERSHIP

There are many factors that impact our ability to partner well with others. Social identity is one.

We live in a culture that separates us into groups, where some of us are under-valued, and some of us are over-valued. Those values are often based on lies, stereotypes and misconceptions, and both unconscious and conscious biases that can have devastating impact on our ability to see and lift up the full humanity of one another. And they affect our ability or even willingness to partner with others.

These categories are socially constructed; they are not real. But their impacts ARE real. In organizations, they impact whom we hire; who we see as leaders; how we partner with others, and the very ways in which we work and interact. We live inside a global system of white supremacy that over-values whiteness and white people while undervaluing BIPOC (Black, Indigenous, and People of Color) people. Every one of us is in relationship to those systems.

As 21st Century leaders, we must be aware and attend to the impact of social identity. As leaders we need to have our radar on: Who's at the table? Who's participating in meetings? What barriers are present that keep people excluded?

Modern racism, homophobia and other forms of oppression can feel subtle, especially to yet are all-pervasive - leaders need to become discerning about this. Notice "microinequities" -- direct and indirect.

Research has shown that leaders who are skilled in working with differences share one thing: they are aware of their own filters, and how their own lived experience unconsciously shapes the way that the view and act toward people.

Knowing the differences that matter to people is more than just skin deep. We need to get to know people in ways that matter to them.

**INSTRUCTIONS**: In our live session, we will be sharing our social identity stories in small groups. To prepare, please complete (or at least reflect on) the following worksheet, so that you are more easily able to stay fully present when listening to the stories of others.

## SOCIAL IDENTITY STORYTELLING

If I didn't define myself for myself, I would be crunched into other people's fantasies for me, and eaten alive". - Audre Lorde

#### **GUIDING QUESTIONS FOR SMALL GROUP STORIES:**

Who are you?
Who are your people?
How do you define yourself?
How are you seen by others?
Which of your stories are hypervisible?
Which are less visible?

# PERFORMANCE

# To enhance our capacity to produce results that further our vision

As leaders our effectiveness is not just based on our personal productivity; it's also based on how well we align and inspire others, our abilities to partner across difference, to model self-regulation and help groups of people navigate change.

360 Evaluation Reflection Pair Shar	360 Eva	luation	Reflection	Pair	Share
-------------------------------------	---------	---------	------------	------	-------

Breakout Instructions: You have 10-15 minutes each; please switch when your time is up. Listeners: listen deeply, do not respond (it's not a conversation).

Feelings? Reactions?

The most important story that stands out in this survey?

### PAIR SHARE (CONT'D)

Greatest strength(s) as a leader? One way I can build on my strengths?
The most important need(s) for development/improvement? One way I can close the gap?
946.
Where can I find support or help for my development??

### **COURAGEOUS CONVERSATIONS**

#### **Courageous Conversation and Leadership**

Any conversation where the stakes are high, feelings are strong and opinions vary will require some measure of courage, clarity and compassion in order to address and resolve the issue. As leaders, we must be prepared to address and resolve issues in a timely manner. Failure to do so means that the issues accumulate and remain in our consciousness. It can also impede effective partnership, and deny both you and the other person the opportunity to grow and develop as leaders, individually and collectively.

In the next week or two, you will have the chance to practice this conversation - or at least, the core message that lies at its heart - with one or two members of the cohort, as part of our asynchronous (off-line) work. We have found over the years that this practice is one of the most valuable parts of this entire training. Learning to conduct 'difficult' conversations with grace, skill and authenticity is a tremendous way to increase one's personal power AND to truly co-power with others, as we strive to be in right relationship with one another across difference. This skill will have a multiplier effect on your ability to partner and lead effectively.

Think of a real person with whom you might want to have a courageous conversation... one that's important for your work or life.

First, make sure you are aligned and ready. It can help to begin by doing a "POP" (identifying your Purpose, desired Outcomes, and determining a few details of the Process - such as when, where, and how). It can also help to conduct a risk/reward assessment (see pages 12-13 below).

If the result of the assessment is not dialogue, pick another relationship where you do want dialogue. Review the suggested criteria below for conducting such conversations skillfully and authentically.

#### CRITERIA FOR EFFECTIVE COURAGEOUS CONVERSATIONS

#### Key points:

- Speak **respectfully**, without arrogance.
- It's my truth...**not the truth.**
- **Be open** to the others' truths as well.
- Remember to **appreciate our differences** when attempting to have dialogue. Things like 'respect' can look/feel very different to those of other backgrounds.
- Draw distinctions between what you see, hear & observe... and the **inferences** you draw and **judgments** you make.
- Avoid attribution of motive, shame and blame.
- Speak more about what "I" feel and impact on you...less "you" or finger-pointing statements.
- Speak with, **not at,** people; stay in contact.
- Find **points of connection**: i.e. the purpose or goals we both share.
- Really **be present** with people, even as you're speaking...as if you were "listening" to them while you talk (vs. projectile vomiting of our truths).
- You can be strong...and passionate...in your self-expression... but stay in contact with the other so you can feel the impact of your words and energy.
- Affirm your commitment to the interests and well-being of the other, as well as yourself.
- Draw upon the power of your own purpose, and your **shared purpose** and interests.

# COURAGEOUS CONVERSATIONS: INSTRUCTIONS FOR PRACTICE PAIRS/TRIOS

In this exercise, you will work with a partner to practice just an essential part of the conversation that has or may be difficult to conduct - the "heart of the heart" of the message. You will not be actually having a full 'realistic' conversation, but rather focusing on just a core aspect of it. For the sake of the exercise, avoid spending too much time talking about the conversation, and resist the temptation to enroll the listener in your 'righteous cause'. Just jump right in, practicing the core message, several times (we recommend at least 10 rounds), until either 15 minutes has passed, or you feel you've reached the "sweet spot" of authenticity and clarity - in a way that can land effectively with the other person.

#### **Summary of Instructions**

#### Speaker:

- Provide minimal details: Who are you talking to? Are there any dynamics re: race, gender or other social identities? What is your purpose? What do you want to know, do or feel as a result of having the conversation?
- Practice the essential, core message (skip the preliminaries: "eg., hello, how are you doing, blah, blah, blah")
- Start by saying the most important key message that you want to communicate without apology or tentativeness.
- You want all the clarity, courage and importance of what you are trying to say transmitted by the energy you bring to the words you are speaking.
- Ideally: your energy, your body language and your words all align in a clear, direct and straightforward message.
- This is a couple of sentences at the most. Not a novella! :)

**Listener:** You are primarily a silent witness. After each round, listener asks and shares:

- How did that feel?
- Here's how it landed with me
- Please refrain from offering advice in 'how to say it differently simply share how it landed what the impact was on you as the listener)

**Observer:** If you are in a trio, the third person serves as a loving observer and witness, and will also offer their feedback on how the message 'landed' after each round.

All: Practice each role-play at least 6-10 times, or until 15 minutes has passed, before switching roles.

# **RISK-REWARD ASSESSMENT**

If you choose to engage in a courageous conversation, what might be the risks or downsides? What might be the rewards, or benefits? List these below.

## ENGAGING IN COURAGEOUS CONVERSATION (HAVING OPEN, HONEST, AND DIRECT CONVERSATION)

Possible Risks	Possible Rewards
	•
	•
	•
	•
	•
	•
	•
	•
	•
	•

- Assess the risk/reward for you, the relationship, the organization.
- Discriminate between real danger and fear.
- Make a clear and committed choice regarding your next steps.

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#### RISK-REWARD ASSESSMENT (CONTINUED)

#### **OPTIONS AND POSSIBLE NEXT STEPS**

IF you decide TO HAVE the conversation -

Make a clear and committed choice not only to engage with this person but how you will engage...

#### Option 1

Engage in authentic dialogue, use the tools you have been learning (maintain your state of resilience, actively listening, and present) to improve the relationship.

#### Option 2

Engage in authentic dialogue with help, use a neutral party to act as mediator, facilitator or witness to the conversation.

Other Options (If you decide NOT to have the conversation)

#### Option 3

De-invest in the relationship, lower your expectations, and make the best of the situation.

#### Option 4

Restructure the relationship, minimize the need for interaction and interdependence (roles, responsibilities, accountabilities). May require the help of those with more authority.

#### Option 5

If the situation is bad enough and change seems impossible, make a conscious choice to leave or terminate the relationship.

<sup>\*</sup> Reprinted courtesy of Robert Gass.

# **WEEKLY QUESTIONS**

#### FOR INDIVIDUAL REFLECTION

What am I learning about my stengths as a leader?

What am I learning about my areas for development as a leader?



## RESILIENCE

# To shift from reactivity to a state of resourcefulness in moments of stress and crisis

#### LEADERSHIP AND RESILIENCE

#### The Biology of Reactivity

As mammals, human beings are biologically designed to react to threats. Much of this physical 'wiring' resides in the amygdala, a small pair of ancient, almond-shaped structures in the brain. The primary task of the amygdala is to constantly scan for safety - to determine, moment by moment: Is it food? Or am I food?

When perceiving a threat, the amygdala floods the body with stress hormones, eliciting a "fight, flight or freeze" response. That nearly instantaneous reaction has saved human lives for millions of years. Many of us have heard the story of the grandmother who suddenly had a strength to lift a car off her grandchild, and some have heard the story Rockwood trainer Suzanne Hawkes shares about being charged by a grizzly sow in northern Canada and freezing (wisely, as it turned out). In both cases, the amygdala was doing its job.

Meanwhile, in such moments the prefrontal cortex - the relatively newer portion of the brain responsible for decision-making, assessment, and discernment - takes a "back seat." In a nanosecond, we temporarily lose our capacity to fully think and reason.

From the perspective of leadership, one challenge is that the amygdala cannot discern between physical threats, and social threats.

And this is where human interactions, including leadership in the workplace, become tricky. Typical amygdala triggers in the workplace can be caused by in-the-moment perceptions of being:

- Dismissed
- Disrespected
- Ignored
- Attacked
- Misunderstood

#### THE BIOLOGY OF REACTIVITY (CONT'D)

Does perception equal reality? Not necessarily. The amygdala cannot discern between physical or social threats. It cannot discern the intention of others, nor the whether a perceived threat is big, or relatively insignificant. That is not its job.

And our own 'amygdala hijack' triggers can be uniquely personal. For example, one person may not even notice being interrupted in a group discussion, while another may be quietly catapulted into a triggered state (which may or not be visible to others) by that same behaviour.

When you have observed a leader - maybe it was you - reacting suddenly and negatively to one of these perceived social threats? Many of the biggest messes leaders make involve emotional reactivity - speaking, or acting, when they are at the mercy of their amygdala. These messes are amplified when a leader has positional or social power.

That is why one of the most important capacities of a leader is to learn to emotionally self-regulate. We can all learn this: to become aware of one's own 'amygdala triggers', and to quickly shift from a state of automatic, unconscious reactivity, to one of conscious choice. We can all learn to shift from powerlessness, where one is at the mercy of one's biology - to powerFULL-ness, where one is guided by a connection to purpose.

That's not to say that effective leaders should walk through the world in a state of blissful equanimity, neither feeling nor expressing strong emotion such as righteous outrage or grief. In fact, to be able to authentically connect to, and be in relationship with others, especially in this moment of history, accessing and expressing such feelings is essential.

And the reality is that, millions of current and emerging leaders that do not look or behave in ways that reflect dominant culture may experience dozens of microaggressions, micro-invalidations and outright hostility in the workplace every single day. This work is not easy. It is often not fair.

And, effective leaders are able to quickly center and be at choice about their state of being and responses, rather than unconsciously, unintentionally reacting in ways that may hurt others, destroy relationships, undermine credibility, or lead to unwise actions.

### TRIGGERS, POWER AND SOCIAL IDENTITY

We invite you to think about addressing triggers in service of our resilience as work that takes place in the moment AND over a lifetime.

I first need to become skilled at managing my triggers during a triggering situation, in real-time, especially if I have positional or social power, because my reactions can have a disproportionate impact on others. The work on resilience and triggers in this week's work is focused primarily on our reactions in real time - holding onto our wisdom, clarity and power as a triggering event happens.

And...racism and white supremacy are part of the bigger context that that permeates everything about leadership. And many of the triggers people experience regularly in workplaces and communities stem from the impacts of that larger context. That's why I also need to commit to the long term education, reflection and skill building effective leaders need in order to address the racism, sexism, homophobia, trans phobia, anti-black racism, white supremacy and fragility over a lifetime.

In addition to triggers that are connected to earlier times in our life when we experienced a core wounding, there are real-time triggers related to racism, sexism, homophobia, transphobia, etc.; some may be completely different.

For BIPOC, it may be the experience of yet another micro-aggression for which the cumulative effects can include anger, exhaustion, depression, anxiety and physical manifestations of disease. For white people, when it comes to triggers related to, say, feedback on racism, it may look like white fragility.

#### KEY POINTS ON TRIGGERING (CONT'D)

- 1. Triggers are events or situations which tend to catapult us instantly into highly emotional reactions, often way out of proportion to the event itself.
- 2. When we are triggered, our intelligence and ability to choose is hijacked by our limbic system and the amygdale-primitive parts of the brain that react before our higher functions can thoughtfully analyze situations and determine the reality of threats.
- 3. When triggered, our capacity to think clearly and to take effective action is greatly impaired.
- 4. We are caught in flight/freeze/appease /bond responses—and as a result we are not resourceful, and can lead us to make big messes.
- 5. Our triggers are very personal what triggers us may not trigger someone else at all.
- 6. Triggers may arise out of our particular life history or the histories of the groups to which we belong.
- 7. Triggers may also be collective (e.g. cultural norms or internalized oppression).
- 8. Triggers may be seemingly slight (my boss tells me my piece of work wasn't as good as it needs to be).
- 9. We may be triggered by something we (and most people) deeply believe to be wrong (e.g. witnessing someone being deliberately cruel to a child).
- 10. A trigger is a "hot button"...a place in us of great sensitivity; as if there were a response waiting to be stimulated.
- 11. Our triggers are often the result of wounding.
- 12. Our triggers may also reflect continual re-wounding in the present of a lifetime of wounding (e.g. the impact of ongoing racism or homophobia).

#### KEY POINTS ON TRIGGERING (CONT'D)

- 13. The point is, the intensity of our emotional reactivity is disabling to our ability to act effectively (and usually out of proportion to the actual event in the present).
- 14. Triggers reach deep down into our emotional wiring, into what we call a "core wound"-a place of deep loss, unworthiness, fear, suffocation, abandonment, annihilation, etc.
- 15. All human beings struggle with core wounds & triggers (which is not to say that we've all been dealt equal shares of challenges).
- 16. Core wounds can sometimes be clearly traced back to early experiences, messages we received from others, oppression or collective trauma, etc. Other people seem to be born with these deep feelings-be it genetic, birth trauma, "past life" memories, etc.
- 17. Our reaction is not caused by the trigger-we already have this core feeling. The trigger touches the defensive apparatus designed to protect us from feeling the core wound.
- 18. The first reaction to a trigger can be seen as a defense against the deeper, underlying feelings like a desperate attempt to stop the source of the triggering.
- 19. We are desperate not to feel our core feelings-feels very dangerous-almost like we might die.
- 20. We have multiple triggers, but many or all of them trace back to the same core wound.
- 21. Being triggered is an automatic, behavioral response without conscious choice. We do have choice about how we respond and act.
- 22. Trigger work challenges and empowers us to: A) take on the discipline of not acting when we are triggered and B) learn how to shift into a more resourceful state before acting.
- 23. It is important to become aware of and work on our triggers so that we can achieve better and more predictable results.

<sup>\*</sup> Reprinted courtesy of Robert and Judith Gass.

### SITUATIONS THAT TRIGGER

#### **DEVELOPING AWARENESS AROUND TRIGGERS**

### A TRIGGER IS AN EXTERNAL EVENT THAT EVOKES AN INSTANTANEOUS, NEGATIVE EMOTIONAL RESPONSE.

It's important to distinguish the actual triggering behavior from your interpretation.

For example: "When John disrespects me..." is not a description of a behavior. The actual behavior might be something like: "When John interrupts me before I've finished speaking..."

Remember, an absence of behavior might also be a trigger. For example: Someone failing to acknowledge you for a significant contribution.

#### List some of your major triggers here:

•			
•			
•			
•			
•			
•			
•			
•			
•			

# **UNDERSTANDING MY TRIGGERS**

REFLECTION PAGE [Please do this after our live session]
What are some of my top triggers, especially at work?
What is one I choose to work with?
How has this trigger impacted your life and your leadership?
Why is it important for you to address this trigger?
To the best of your ability, what do you know to be about the wound that is the source of this trigger and how would you describe it?

## WHAT TO DO WHEN TRIGGERED

#### STEP 1 Name it

Name it for yourself – not for others. Be able to recognize the cues in your body.

#### STEP 2 Create appropriate space

Resist the impulse to act when triggered.

#### STEP 3 Shift your state

- breathing
- moving your energy
- feeling your deeper feelings ("travel down the elevator shaft")
- connecting to purpose
- "drop it!"
- self-humoring: exaggerate, get playful
- anchoring
- meshing

#### **STEP 4** Respond to the situation

<sup>\*</sup> Reprinted courtesy of Robert and Judith Gass.

# BEING TRIGGERED: THE TELL-TALE SIGNS

## ONE OF THE CHARACTERISTICS OF BEING TRIGGERED IS THAT WE MAY NOT BE AWARE THAT THIS IS SO.

Our focus tends to be on what's wrong with the external event or behavior, and our thinking capacity is somewhere back in the reptilian state of "Am I food?" or "Are they food?" Because we cannot depend on our own thinking, it's useful to be able to identify some of the common tell-tale signs of being triggered:

- 1. Physical sensations: Not breathing, or rapid breathing, body tension, clenched fists, 'ping-pong' balls in shoulders, upset stomach, headaches, etc.
- 2. Judgmental, defensive, blaming thoughts
- 3. Difficulty in paying attention, dissociation, exhaustion, spacing out, falling asleep
- 4. Obsessively repeating thought patterns
- 5. Internally (or externally) arguing points, justifying yourself
- 6. Emotional outbursts
- 7. Feeling stupid, difficulty thinking clearly
- 8. Feeling sorry for yourself, feeling victimized
- 9. Bolting, fleeing, isolating yourself
- 10. Sudden intensive engagement in addictive behaviors

<sup>\*</sup> Reprinted courtesy of Robert and Judith Gass.

## **ANCHORING TECHNIQUES**

A PHYSICAL GESTURE TO ANCHOR YOUR STATE OF INNER POWER:
AN IMAGE TO ANCHOR YOUR STATE OF INNER POWER:
A WORD OR PHRASE TO ANCHOR YOUR STATE OF INNER POWER:
You can use any of these tools singularly or in combination.
For the physical gesture, it can sometimes be useful to simply imagine you are assuming the posture or making the motion. (You may want to be careful about adopting a "tiger pose" in the middle of a staff meeting.)

It is helpful to engage your body in the experience of the anchor. One of the easiest and most effective ways of doing this is to consciously link your breath to the application of each tool. For example, see your anchoring image ... now, breathe into the image...

Breath not only helps to physically diffuse the effects of the anchor throughout your body, it also helps to quiet mental distractions and focus your awareness in support of your conscious intentions.

### LEADERSHIP AND RESILIENCE

#### **Enduring Wisdom**

I can be changed by what happens to me. But I refuse to be reduced by it!

- Maya Angelou

What if I stumble?

I will become resilient

What if I break?

I will rebuild myself.

What if I fail?

I will have a story to tell.

I will have someone to inspire.

I will have someone to lead.

- Najwa Zebian

Do you have the patience to wait until your mud settles and the water is clear? Can you remain unmoving until the right action shows itself? - Lao Tzu: around 525 BC

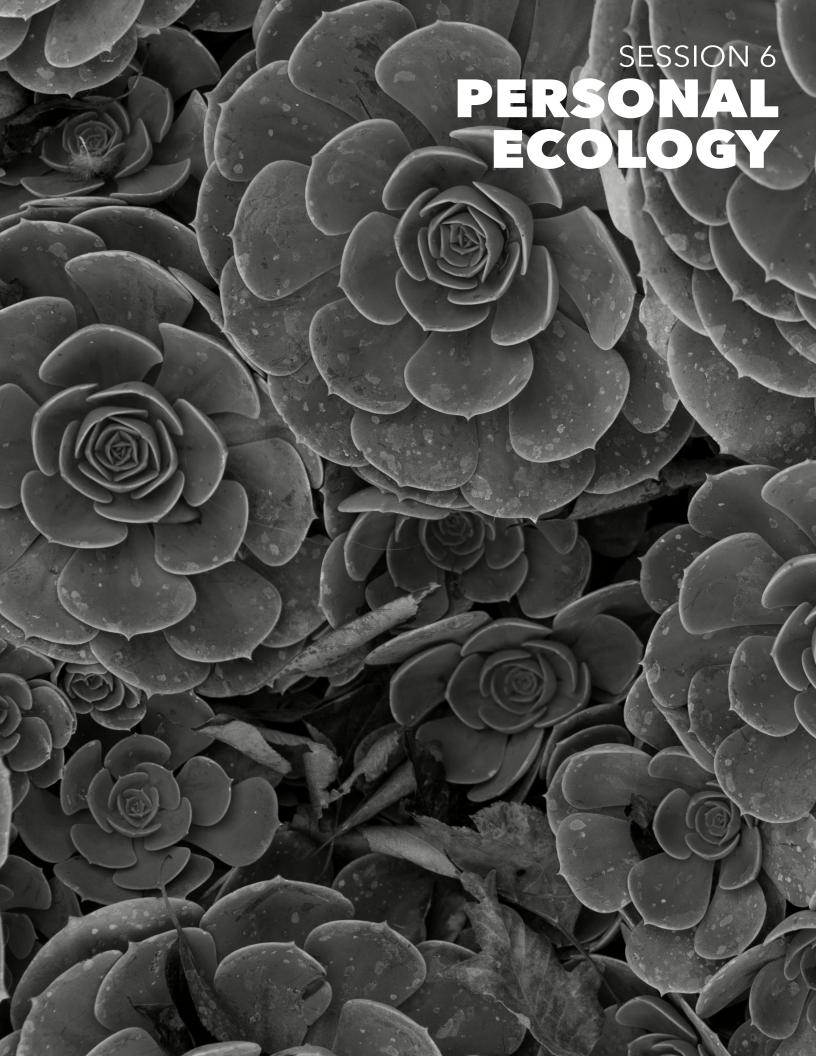
"For one to control one's thoughts and feeling means one can actually control one's atmosphere and all who walk into its sphere of influence." - Malcolm X

It is easy to fly into a passion. But to be angry with the right person, and to the right extent, and at the right time, and in the right way. This is not so easy. - **Aristotle, around 350 BC** 

# **WEEKLY QUESTIONS**

#### FOR INDIVIDUAL REFLECTION

What am I learning about my strengths as a leader?
What am I learning about my areas for development as a leader?



# **PERSONAL ECOLOGY**

To maintain balance, pacing and efficiency to sustain our energy over a lifetime

#### Personal Ecology and Leadership

This week we focus on the practice of "Personal Ecology". We call it "personal ecology" because many of the principles of ecology apply to our own energy systems: the long term balance of inflows and outflows of energy and resources; inputs and outputs.

All the leadership practices we've explored so far connect to Personal Ecology. Being grounded in Purpose and guided by a longer-term Vision helps us choose where to spend our time and precious life force. Being connected to others in collaborative, authentic Partnerships can sustain our energy and amplify our capacity for shared results and Performance. Resilience is about managing our state of being even in times of stress and crisis, and regulating our nervous systems so that we are at choice with how and where we expend our energy.

#### Leadership and Pacing

So, does a balanced "personal ecology" refer to walking around in a state of blissful evenness, with no ups and downs, no strong emotion, no periods of intense pacing? No - not at all. For most of us, that is neither realistic nor desirable. Sustainable ecosystems aren't still or static, either. Healthy ecosystems are dynamic, and always changing, though sometimes at a pace that is less apparent to humans. But healthy ecosystems are in balance overall - they cycle in a sort of dynamic equilibrium.

We can, too. Have you ever been involved in a campaign, event or project where everyone involved is working flat-out at full speed, for long hours with little sleep ... and it feels GREAT? For many of us, this kind of pacing can be exhilarating. When it leads to shared outcomes across an aligned group of people, it can also be deeply on-purpose. The key is that such pacing is not all the time. Personal ecology lies in the notion of pacing over time - so that after the campaign or event, there is a pause: a time to rest, recover, and then perhaps to reflect, and discover.

Many of us do not pause. Often we feel we can NOT pause - that rest is a luxury only for the privileged. Yet our bodies often force the issue - and we become ill, or burnt out, and we pause nonetheless. And this has impacts not only for us, but for our organizations, communities and movements.

It's worth reflection: Do you wonder/ worry if you are doing enough? In this season of tremendous change and challenge, do you wonder if you are contributing enough to addressing the issues facing our world?

### PERSONAL ECOLOGY AND LEADERSHIP (CONT'D)

#### **Impacts of Burnout**

The way we work in our organizations can be like the way many manufacturing plants externalize their own costs by dumping their waste into the air, water and land. This work sometimes does the same thing with peoples' energy. And stress and burnout don't just impact individual leaders, but everyone with whom they are connected. Burnout has impacts in four key areas:

#### **1. Quality of life.** Consider how burnout and overwork impact:

- Your physical health and wellbeing
- Your ability to have and nurture healthy relationships which in turn nurture you
- Your capacity to experience pleasure, joy and fun
- Your capacity to connect to others, to yourself, to spirit and creativity

#### 2. Effectiveness:

- When any system is stressed, it becomes brittle fragile and easily broken
- When people are burnt out, their work tends to be lower quality and less creative
- In states of burnout, we tend to get caught up in frantic activity that may not yield results
- The focus of overworked leaders tends to shift entirely toward fighting today's fires, rather than building greater long term capacity
- Like all mammals, under stress we may develop both literal and metaphorical 'tunnel vision', narrowing our focus to things immediately in front of us, with little capacity to tend to and care for others, or the whole
- Our energy and focus can also contract into a sense of scarcity and rigidity; leaders in burnout can become controlling when in this state of energetic deficit, micromanaging or delegating ineffectively
- When we are burnt out, our overall ability to collaborate and partner well becomes impaired

#### 3. Sustainability

- Most of us are engaged in change work that is multi-generational, tackling huge social, environmental and economic issues whose solutions will not be found in the next year, or even next decade
- Turnover in the non-profit, helping and advocacy sectors is relatively high, with huge costs in recruitment, onboarding and retention for their organizations. It takes as much as ten years to master a craft, yet the career span of many activists is 7 years or less
- When leaders are either overextended or leave the work altogether due to burnout, we lose the mentors necessary to support and nourish the next generation of leaders

### IMPACTS OF BURNOUT (CONT'D)

#### 4. Modeling

- Leaders that are out of balance themselves model and influence whole organizations or communities to be out of balance, as well
- Leaders out of balance risk becoming complicit in perpetuating the extractive economy and way of life of an entire society out of balance one that many of our ancestors fought hard to change and that many younger workers refuse to take part in
- As leaders we need to look at how our organizations and their cultures and systems may
  be promoting stress, overwork and burnout. The more positional power we have, the
  more ability we have to change those systems and cultures. We can remain focused on
  achieving common goals and getting results, and do so while modeling and supporting
  quality of life, effectiveness, and sustainability.
- This moment in human history may well be unprecedented in terms of the rate of change and expectations for productivity and pacing, And yet, the challenges leaders face in striving to attain a more balanced personal ecology and avoid burnout are not new. Decades before the invention of the internet, email or even personal computers, theologian and activist Thomas Merton wrote this (continued on next page):



There is a pervasive form of contemporary violence:
Activity and overwork.
The rush and pressure of modern life are a form
Perhaps the most common form
Of its innate violence.

To allow oneself to be carried away By a multitude of conflicting concerns To surrender to too many demands To commit oneself to too many projects To want to help everyone in everything Is to succumb to violence.

The frenzy of our activism neutralizes our work for peace. It destroys our own inner capacity for peace. It destroys the fruitfulness of our own work. Because it kills the root of inner wisdom Which makes work fruitful.

THOMAS MERTON CONJECTURES OF A GUILTY BYSTANDER (1965)

# **URGENCY INDEX**

Let's explore where we might be in terms of urgency. Circle the number that best represents your normal behavior or attitude using this scale:

	0 never	1	som	2 netimes	3	4 always
1)	I seem to	o do my best w 0	vork when I'm 1	n under pressu 2	re. 3	4
2)		lame the rush ctive time with	•		-	ure to spend deep,
		0	1	2	3	4
3)		n frustrated wait or stand i		ness of peop	ole and th	ings around me.
		0	1	2	3	4
4)	I feel gui	lty when I take 0	time off.	2	3	4
5)	-	seem to be rus 0	shing betwee	en places and e 2	events. 3	4
6)	I frequer	ntly find myself 0	pushing ped	ople away so I o 2	can finish w 3	hat I'm doing. 4
7)		kious when I'm 0	out of touch 1	with the office 2	. 3	4
8)	I'm often	preoccupied 0	with one thir 1	ng while I'm do 2	ing someth 3	ing else. 4
9)	I'm at my	/ best when I'n 0	n handling a 1	crisis situation. 2	3	4
10)	I often ea	at lunch or oth	er meals whi	le I work.		
		0	1	2	3	4

# URGENCY INDEX (CONTINUED)

11)	I keep thinking tha	at someday I'll   1	be able to do w 2	hat I really wan 3	t. 4	
12)	It's difficult for me deadline.	to really comp	lete things with	out the pressur	re of a	
	0	1	2	3	4	
13)	I often give up qu situations at work	•	important peop	ole in my life to l	handle	
	0	1	2	3	4	
14)	I feel like I've reall on my 'to do' list.	y been produc	tive if I've chec	ked off a lot of i	tems	
	0	1	2	3	4	
15)	I get irritated whe go right or get de		ake mistakes, o	r when things d	lon't	
	0	1	2	3	4	
16)	I start thinking abo	out what I have	to do at work v	within a few min	nutes	
	0	1	2	3	4	
17)	I have a hard time of the work day.	slowing down	and relaxing w	hen I reach the	end	
	0	1	2	3	4	
18)	When something thought is what I	-		ee time, my firs	t	
	0	1	2	3	4	
19)	I have a hard time work doesn't intru	-	sanct space in	my life into whic	ch	
	0	1	2	3	4	
20)	While I'm working, to do that are hang	•	sure of all the o	ther things I hav	/e	
	0	1	2	3	4	
	Add to	gether all your	scores and pla	ce the total her	e:	
			•	0-30 Low	urgency mindset	ŀ
					urgency mindset	
					Urgency mindset	

Source: Source: Stephen Covey, First Things First (1996)

# FOUR ELEMENTS OF PERSONAL ECOLOGY

Our approach to personal ecology is holistic, and includes four dimensions. They're all related, but when we break it down in this way, it becomes easier to explore each one, and determine where we have more choices. They are:

- 1. Load Management: Load refers to the actual volume of work we have, the number and size of our goals. Shifting this element can have the greatest multiplier effect on our personal ecology. However, we are often embedded in organizations or larger systems where many of our goals are assigned to us, or at least seem non-negotiable. Even then, we often have more agency than we may at first recognize, from renegotiating or reframing the goals themselves, to negotiating different timelines, adding resources to the system, delegating, or creating new efficiencies.
- 2. Personal Effectiveness: This refers to our efficiency: how much we accomplish in a given period of time. There are countless systems, tools and frameworks to improve one's efficiency, but in most cases these amount to 7 15% of improvements; "Work Smarter, Not Harder" only goes so far when it comes to personal ecology.
- 3. Energy Management: Our minds, bodies and spirits all require nourishment. And most of us already know what we need to become more whole and energized over time. What do you already know about what nourishes your own body when it comes to rest, play, movement, food, and hydration? What do you know about the practices, people and environments that replenish your spirit and creativity? What are the activities, people and practices that enliven your mind and curiosity, keep you satisfied and growing intellectually? And how do each of these look across a single day, a week, a year, or a lifetime?
- **4. State Management:** Finally our personal ecology is enormously impacted by our state of being. We all have the capacity, with training, intention and support, to learn to shift our own states of being from reactivity and stress to more spacious and effective states of being where we have greater access to our own wisdom and discernment, using far less energy in the process.

# HONORING YOUR PERSONAL ECOLOGY

There is no one "correct formula" for adjusting any of these, or achieving our own personal ecology at all. Each one of us is different, and our internal and external conditions may constantly change over time. What one of us needs in our 20s may look very different in our 60s. There is no one ideal balance. And it does not help to compare ourselves to others. The work for any leader in exploring personal ecology is to determine: 'what is the right balance for me, at this time'?

This work is about what graces your life and your leadership now - even when many of our social movements and organizations reward overwork for showing that we are "down for the cause". This is not to say that personal ecology is the opposite of hard work! This is about making conscious choices about how you spend your time - so that you have the energy to be engaged for a lifetime.

It is even more important for those of us whose very identities mean we are often operating in a world that is not designed for us to thrive.

As queer African-American writer Audre Lorde wrote decades ago, "Caring for myself is not self-indulgence. It is self-preservation, and that is an act of political warfare."

# PERSONAL ECOLOGY PAIR/TRIO QUESTIONS

#### **Breakout 1:**

- Take turns serving as deep, active listeners for one another (please refrain from offering advice), as each of you takes a few minutes to explore this prompt:
- My current balance is....
- Pairs: switch half-way through. Trios: switch 1/3 of the way through.

#### **Breakout 2:**

- In turns, please each complete the following sentence: "If I were fully committed to my wellbeing over the long haul, I would..."
- Continue the process, answering the question in turns, until the breakout time ends

#### **Breakout 3:**

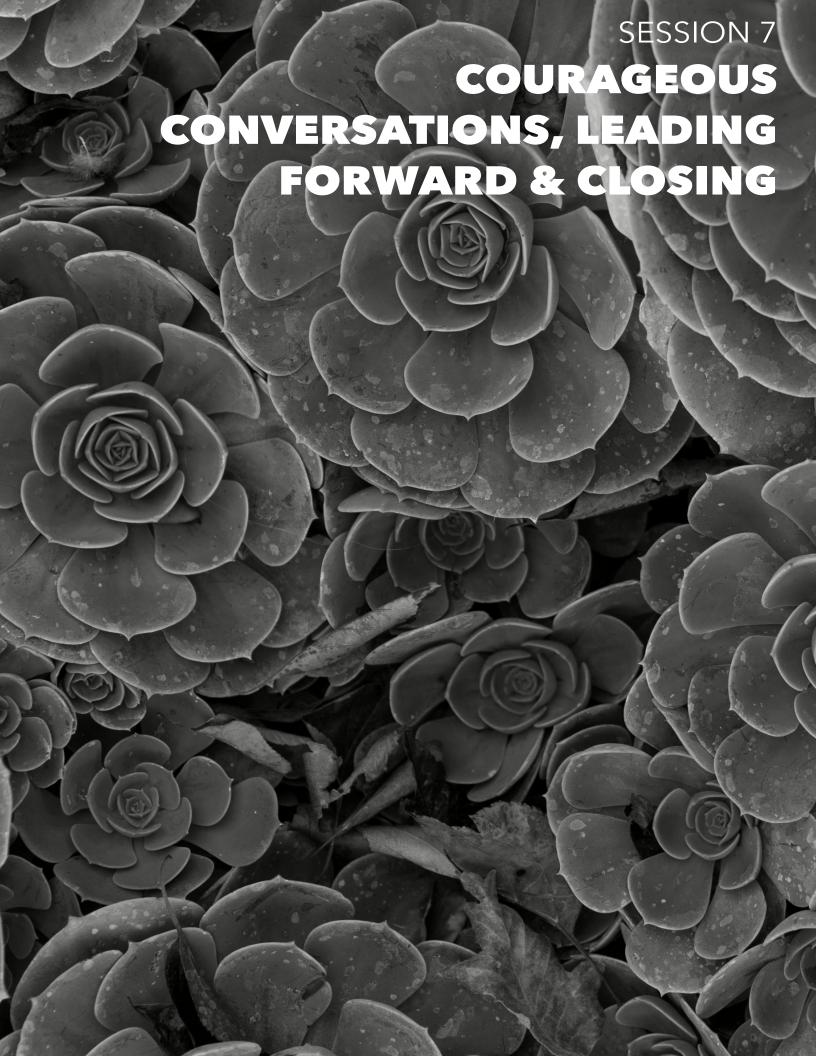
• Take turns serving as deep, active listeners for one another (please refrain from offering advice), as each of you takes a few minutes to explore: "What my loved one would wish for me..."

# **DRAWING 1: MY CURRENT BALANCE**

# **DRAWING 2: MY IDEAL BALANCE**

# ONE POWERFUL STEP

What is one step you could take that would grace your life and leadership now?				
"Caring for myself Is not self-indulgence. It is self-preservation, and that is an act of political warfare" - Audre Lorde				



# COURAGEOUS CONVERSATIONS

# Reflection Page

Partnership: "To build and maintain strong, interdependent relationships that advance our vision."
What are you learning/noticing about your courageous conversations practice?
What are you learning about doing them well?
Did your purpose or desired outcomes change with the practice?

# THE PATH FORWARD













In this world of accelerating technologies, expanding markets, and increased competition, change is inevitable – it is not our choice whether or not to change, only how. We can choose to react to events, driven by habit, or to engage with and shape them, driven by purpose, plans, and participation.

The first option is an invitation to confusion and calamity; the second, an invitation to opportunity. As a leader, your charge is to actively engage with the realities of your environment with creativity, continuously building the partnerships that will allow you, your organization and communities to thrive.

This is not a passive charge. It requires clarity, an adaptive team, and appropriately aligned processes and systems. In addition, it requires hard work and courage for those of us who are committed to social transformation.

During the past few days, you have been on a journey of learning and inquiry. You have learned in a community in which each is invited to contribute their wisdom and unique perspective. Your challenge is to maintain the connections you've made, to keep your learning alive as you move into the future.

The tension that exists between what is, and what can be, is a source of creative energy and aspiration. We encourage you to engage with this tension, so that you will continue to grow and develop your leadership skills.

You have made a start. It's up to you to commit yourself to making sure that this start counts for something – that it makes the difference we all want to see in ourselves and in the world.

# **ONE THING**

## Reflection Page

If you could identify one step, practice or habit that could potentially have a multiplier effect on your leadership, what might that be? There may be many practices you wish to deepen or begin - so start with just one.

What is one thing I want to work on in my leadership, based on all previous weeks?

# LEADING FORWARD: YOUR INDIVIDUAL WORKSHEET

Leadership challenge or skill I want to develop/	work on:

Le	adership challenge or skill I want to develop/work on:
•	P: (Purpose) Why I'm working on this
•	O: (Outcome) What I'd like to see
•	P: (Process) How I will go about this work
Su	pport I will need:
•	From whom?
•	What support would look like (be specific)
•	How I will ask for it
Pe	rformance measures I will use: (timeframe, benchmarks, etc.)
CH	IECK-IN DATE with my partner:

# LEADING FORWARD: PARTNER WORKSHEET

This second sheet is for our live final session; it is here for your documentation of your partners plan so that you can refer back to this on subsequent calls.

Leadership challenge or skill I want to develop/work on:				
• P: (Purpose) Why I'm working on this				
• O: (Outcome) What I'd like to see				
• P: (Process) How I will go about this work				
Support I will need:				
• From whom?				
What support would look like (be specific)				
• How I will ask for it				
Performance measures I will use: (timeframe, benchmarks, etc.)				

## LEADING FORWARD: TRIOS PARTNER WORKSHEET

This second sheet is for our live final session; it is here for your documentation of your partners plan so that you can refer back to this on subsequent calls.

Leadership	challenge	or skill I	want to	develop	/work on:

•	P: (Purpose) Why I'm working on this
•	O: (Outcome) What I'd like to see
•	P: (Process) How I will go about this work
Su	pport I will need:
•	From whom?
•	What support would look like (be specific)
•	How I will ask for it
Pe	rformance measures I will use: (timeframe, benchmarks, etc.)
Cŀ	HECK-IN DATE with my partner:

# LEADING FORWARD P.O.P. FOR PARTNERS

GUIDE QUESTIONS: WITH YOUR SUPPORT PARTNER, DISCUSS
Why is this important for both of us? What is in it for us?
What outcomes do we each want? (quick review)
Process:
How often do we want to communicate?
• For how long - (we recommend at least 3 months)
When will our first call be? (schedule it)

CHECK-IN DATE with my partner: \_\_\_\_\_







#### **DOWNLOAD MORE RESOURCES**

Watch your email for a link to download a huge bundle of additional resources to help you deepen your leadership practice, including vision planning tools and inspiration, exercises for your team, and much more.



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# PERSONAL WELLNESS INDEX

By Michael Bell and Suzanne Hawkes

Circle the number that best represents your normal behavior or attitude using this scale:

	0 never	1	2 sometimes	3	4 always
1)	I have time to play 0	in ways that ref 1	resh and renew me 2	. 3	4
2)	I am energized and	I ready to go at t 1	the start of my day.	3	4
3)	I regularly get a go 0	od night's sleep. 1	2	3	4
4)	I effectively notice	and manage str	ess as it arises. 2	3	4
5)	I can execute my c	urrent workload 1	with ease and cons	sistency. 3	4
6)	I have time to dayo	dream and reflec	et. 2	3	4
7)	During the day, I ta or other physical n		e when I'm hungry,		
0.1	0	1	2	3	4
8)	I periodically renev	w my energy thro 1	oughout the day, ev 2	ery day. 3	4
9)	l eat food that sati 0	sfies me and sus 1	tains my energy thi 2	oughout the da	ıy. 4
10)	I often have ways t 0	o express my cre	eativity. 2	3	4
11)	I have time to enjo	by my hobbies.	2	3	4

# WELLNESS INDEX (CONT'D)

12)	Those that love and	care about me	me are happy with my life's balance.		
	0	1	2	3	4
13)	I spend enough time	with family and	d friends.		
	0	1	2	3	4
14)	I take time to partici	pate in fun acti	vities with others.		
	0	1	2	3	4
15)	I feel connected to a	and aware of my	body's needs.		
	0	1	2	3	4
16)	I take time to pause	and "reset" no	w and again.		
	0	1	2	3	4
17)	I am satisfied with n	ny balance of so	litude and engage	ment with other	S.
	0	1	2	3	4
18)	I make time for joy a	and connection.			
	0	1	2	3	4
19)	I feel at peace.				
	0	1	2	3	4
20)	At the end of my day	, I am content a	nd ready to sleep.		
	0	1	2	3	4
	V 49 +0	anthor all you	r scores and pla	co the total ber	0.
	Add to	genner an you	i scores and pla	ce the total fiel	€

### **JOURNAL PAGE**

1) \	Which areas of your health and well-being do you feel satisfied with, that can serve as models for your success?
2)	What are the three most important areas that need your attention in your practice of health and well-being?
3)	Of these three, which is the primary area you need to focus on (change) to be a more sustainable and healthy leader, or, can serve as a catalyst for improving in other areas?
4)	What else might improve if this area improves?

### **COACHING WORKSHEETS & NOTES**

#### Instructions:

- Work with data from your surveys
- Focus on just those 2-3 things that feel most important
- As the listening partner, your role is to interview your partner and be really present with them in their exploration of this material
  - practice presence, deep listening, open questions, powerful feedback

As	partners,	support 6	each ot	her in
----	-----------	-----------	---------	--------

- one or more goals
- at least one goal fleshed out into a POP for action

Goal(s): Be as specific as possible!
1.
2.
3.
Identify one goal for which you will create a POP:
Purpose: <b>Why</b> is this important to me?

## **COACHING WORKSHEET**

Outcomes: When I make an improvement (change) in this area, <b>what</b> will be different for me (and possibly for others)?
Process:  More specifically, what are the 3 <b>actions</b> I could take to improve my overall wellbeing in this area?
Of these 3 actions, which is the <b>most critical</b> or can serve as a catalyst for overall improvement?

# LOAD MANAGEMENT

#### By Robert Gass

Do you feel like you have too much to do? It may not be your imagination. Many of you reading this simply have too much to do, and it's not going to be solved by better time management. You may actually be needing to lighten your load.

"Load": the sum total of all that we are responsible for—our commitments to both work and our family, home and community. This simple but powerful tool is designed to you reduce your workload.

#### Load management formula:

Load =	goals
	resources x timeframe x efficiency

In order to reduce your overall load, you can use any combination of the 4 Load Reduction Strategies:

- Add resources (other people, support, etc.)
- Extend timeframes and deadlines for projects
- Improve efficiency
- Reduce goals (actually do less)

#### Load Reduction Strategy #1: Add resources

This is one of the most effective ways to create significant load reductions with one action. This might look like:

- Delegating some of your responsibilities to an existing staff person(s)
- Making a new hire to take over some of your responsibilities
- Outsourcing some of your responsibilities
- Hiring or engaging support personnel to assist you

#### Load Reduction Strategy #2: Extend timeframes

This strategy does not always apply, but is always an option to consider.

#### For example:

- Pushing back the date of a major conference or meeting you are planning
- Extending the due date for a project
- Slowing the pace of a project by re-conceptualizing the # of months/years it will take

#### Load Reduction Strategy #3: Improve efficiency

How efficiently do you make use of your time and resources? What opportunities are there to reduce your overall load by becoming more efficient?

#### For example:

- Improve your system for processing and tracking incoming information and requests
- Better time management and prioritization
- Improve use of technology
- Better planning

#### Load Reduction Strategy #4: Reduce goals

We are often reluctant to go here, as there may be disappointment or pain involved—for ourselves and others. We may have to reduce and renegotiate expectations with our Boards, our staffs, our members, our clients or customers, or our loved ones. But when needed load reductions cannot be achieved by other means, we may need to find the courage to scale back what we had planned in the name of actual capacity, sustainability, quality of life, or performance quality.

This might include such moves as:

- Cancelling a planned project
- Ending an existing project
- Exiting boards, committees, coalitions, networks, etc.

#### Task #1: set % reduction I wish to accomplish in my load

Let this be your most sober, thoughtful assessment. Do not set this target based on what you think is possible. Leaders in our programs have successfully accomplished load reductions of up to 40%.

Let this number reflect what you really want for your life!

My overall load reduction target \_\_\_\_\_%

#### Task #2: where this reduction will come from:

When we think about trying to make significant loan reductions, our mind immediately generates lists of reasons of how impossible it will be because of this or that.

Challenge yourself with the following exercise: Imagine you have just consulted with a medical doctor, who has diagnosed you with a serious, possibly fatal case, of leaderitis\*

\* leader-itis: a common disease among leaders.

Symptoms include a mistaken belief that you are indispensible, that what you do is terribly important to the future destiny of humanity and the cosmos, a tendency towards complaining about too much to do, withdrawal symptoms when not checking emails & text messages, and concern for your physical/emotional/mental well-being from your loved ones.

Seriously play along with this exercise.

Imagine you actually had to achieve your percentage load reduction within a year. No choice about it. It has to be done. Now-devote all your commitment and creativity to determining how you are going to accomplish this.

Determine how you will utilize some or all of the 4 Load Reduction Strategies to achieve your target load reduction:

reduce goals%
add resources%
extend timeframes%
efficiency%
total%
(should equal % load reduction target)

#### Task #3: Add detail to the plan

Use the chart on the next page to add more detail to each of the tactics. What will you actually do to achieve the target percentage reduction for this tactic?

<b>Load Reduction Plan</b> Sketch out broad plans for how you will utilize some or all of the 4 Load Reduction Strategies to achieve your Target Load reduction of%.
Remember: the percentages from the 4 Strategies should equal your total Target Load Reduction.
Reducing goals I will reduce my load% by actually eliminating the following work:
<b>Extending deadlines</b> I will reduce my load% by pushing back the following dates and deadlines, and/ or slowing the pace of these projects:
Adding resources I will reduce my load% by delegating, hiring or outsourcing the following:
Efficiency improvements I will reduce my load% by the following specific improvements in efficiency:

#### Rebalancing your load

In addition to (or instead of) reducing your overall load, you may wish to look at rebalancing your mix of activities. Perhaps you can find ways to lessen or eliminate some aspects of our work that that don't play to your strengths, that you find more draining than other aspects of your work, or that you simply don't like. And maybe you can shift your roles and work to send more time engaged with activities that you find meaningful or joyful. If you sense the need to rebalance your load, you will find help on the following page.

"There is never enough time to do everything, but there is always enough time to do the most important thing." - Brian Tracy

"I'm going to choose how to spend the day, rather than having the day choose to spend me." - Anon

"One of the symptoms of an approaching nervous breakdown is the belief that one's work is terribly important." - Bertrand Russell mathematician, philosopher, anti-war activist

"The bad news is time flies. The good news is you're the pilot." - Michael Altshuler

#### **Load Rebalancing Plan**

Activities I want to significantly reduce:
Activity #1How I will accomplish this:
Activity #2How I will accomplish this:
Activity #3 How I will accomplish this:
Activities I want to significantly increase:
Activity #1How I will accomplish this:
Activity #2 How I will accomplish this:
Activity #3How I will accomplish this:

#### Reassessing Your Workload: Step 1- Mind Dump

In the space below, list all of the projects on your plate right now. A project is anything with 2 or more steps.

#### Reassessing Your Workload: Step 2 - Coding

Mark up your brain dump list with the following codes. Not everything will get a code, and some pieces of work may get 2 (i.e. a piece of work that needs to have the timeframe extended and the outcomes renegotiated).

#### X - Take off your plate:

Work that really doesn't need to happen or is no longer relevant - you may or may not be able to unilaterally remove it from your plate

#### T - Extend/adjust timeframe:

Work where the timeframe or deadline can be adjusted to create more spaciousness - this can mean starting or ending a project later

#### D - Delegate/distribute:

Work that can be delegated to someone else or where the work can be differently distributed/shared

#### R - Renegotiate:

Work that can be renegotiated with another human being to redefine the expected scope, outcomes, timeframe, resources, or roles/responsibilities.

#### P - Prioritize:

Work that you need to make more of a priority than it is now - note, not everything can be a priority!

Reassessing Your Workload: Step 3 - What's Next
Now that you've identified work that can be <u>taken off your plate</u> , what do you need to do/with whom do you need to talk to make that so?
Now that you've identified work where you can <u>extend/adjust timeframes</u> , what do you need to do/ with whom do you need to talk to make that so?
Now that you've identified opportunities to <u>delegate</u> work, what do you need to do/ with whom do you need to talk to make that so?

Reassessing Your Workload: Step 3 - What's Next continued
Now that you know what work you need to <u>renegotiate</u> , what do you need to do/ with whom do you need to talk to make that so?
Now that you know what work you need to <u>prioritize</u> , what do you need to do/ with whom do you need to talk to make that so?
What impact will it have on your workload if you are able to make the shifts you've identified above?

#### Family/Work Balance

- 1. On your deathbed you will probably not be wishing that you spent more time at the office. Make choices as if you might have one year to live.
- 2. Hold and nourish a positive vision of what you want from your family life.
- 3. Don't let "being with the family" or "time with your beloved" become a "should." Your feeling obligated, trapped and pissy energy is no gift to anyone.
- 4. Make clear choices... don't create the worst of both.
- 5. Critical importance of good boundaries work to fills all available space
  - family vibe is very different from work vibe
  - keep clear, inviolable boundaries around family time
  - it takes a while to recover from even one call
  - knowing that you might be interrupted at any moment leaves all of you not relaxed with each other
- 6. Family life, especially with children, thrives on rhythm and predictable patterns set regular guidelines such as no work calls after 6:00 p.m.; no work on Sundays, etc.
- 7. Work vibe/family vibe: When you re-enter your relationship or family space, you want to be operating at a very different frequency from telephone/e-mail buzz. You may even want to take some transition time before you walk in the door (work-out at the gym; meditate in the driveway, etc.)
- 8. Regarding travel
  - comings & goings are stressful on most partnerships & family systems
  - fewer, longer trips may be easier than lots of shorter ones
  - schedule in extra reconnect time with your partner and/or children upon your return

#### 9. With your partner:

- don't let him/her hold the value of relationship/family alone & turn them into a nag
- really be partners in this
- don't dictate what's so about you and work
- put out your needs/desires... and listen to theirs
- commit to win/win
- don't fudge, under-estimate, deceive out of conflict avoidance... makes it much worse
- deal directly with differences
- make clear agreements to which you are 100%
- then keep them impeccably-your trustworthiness is on the line

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# **NOTES**

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Everyone has been made for some particular work, and the desire for that work has been put in every heart. Let yourself be silently drawn by the stronger pull of what you really love.

- Rumi

What you risk reveals what you value.

- Jeanette Winterson

Many persons have a wrong idea of what constitutes true happiness. It is not attained through self-gratification but through fidelity to a worthy purpose.

Use your imagination not to scare yourself to death, but to inspire yourself to life.

- Adele Brookman