

Collaborative Leadership

Self-Reflection

Facilitator's Guide

Collaborative Leadership

Self-Reflection

Purpose

Provide a methodology for and practice in self-reflection regarding Collaborative Leadership practices and competencies.

Learning Objectives

1. Increase the conceptual understanding of Self-Reflection and the interrelationship among the six Collaborative Leadership practices.
2. Examine the concept of Self-Reflection as a practice of collaborative leadership.
3. Identify the relationship between the components of emotional intelligence leadership competencies and Self-Reflection.
4. Examine the components of emotional intelligence leadership competencies and their relationship to personal collaborative leadership skills.
5. Increase observation and self-reflection skills by identifying verbal and non-verbal behaviors that impede and facilitate effective collaboration.
6. Explore a variety of continuous quality improvement (CQI) tools.
7. Create a Personal Learning Plan to increase competency in Self-Reflection using outcomes of self-assessment and awareness of resources for extended learning.

Summary of Activities

- | | |
|--|----|
| 1. Welcome and Program Introduction..... | 3 |
| 2. Introduction to Collaborative Leadership and the Six Practices..... | 3 |
| 3. Module Purpose and Objectives | 6 |
| 4. Self-Reflection Skills: Self-Assessment | 7 |
| 5. Conceptual Overview: What is Self-Reflection? | 7 |
| 6. Leadership Reflection Timeline..... | 8 |
| 7. Collaborative Process Observation and Reflection..... | 8 |
| 8. Continuous Quality Improvement (CQI) Tools..... | 11 |
| 9. Personal Learning Plan | 11 |

Equipment and Supplies

- LCD or overhead projector
- 8 ½ x 11" paper, 6 pieces
- Chart paper
- Markers
- Tape

Curriculum Materials

- *Participant's Guide: Self-Reflection*
- *Slide Set: Self-Reflection*

Preparation

- Copy *Participant's Guide*, 1 per participant.
- Copy *Slide Set*, 1 per participant.
- Read Goleman, D., et al. *Primal Leadership: Realizing the Power of Emotional Intelligence*, Appendix "Leadership Competencies" (See *Readings and Resources, Participant's Guide, p. 13*).
- Make one sign for each of the seven roles in Activity 7 (*Facilitator's Guide, p. 9*) to tape to the backs of participants' chairs.
- Copy and cut **Role Description** strips (*Facilitator's Guide, p. 12*).
- Become familiar with Collaborative Leadership Web site learning resources (www.collaborativeleadership.org).

Display Slide 1 as participants enter room.

1. Welcome and Program Introduction

- Review information contained on Slide 1.
- Introduce yourself and any other facilitators.
- Conduct a participant introduction activity.

Slide 1

Complex Problems → Collaborative Leadership → Effective Solutions

The Turning Point Leadership Development National Excellence Collaborative

Vision: Collaborative leadership is used to its fullest potential to achieve policy and systems change that maximizes the public's health.

Mission: Increase collaborative leadership capacity across sectors and at all levels.

Other Turning Point National Excellence Collaboratives:

- Modernize public health statutes
- Create accountable systems to measure performance
- Utilize information technology
- Invest in social marketing

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2. Introduction to Collaborative Leadership and the Six Practices

Learning Objective: Increase the conceptual understanding of Collaborative Leadership and the interrelationship among the six Collaborative Leadership practices.

- Review *What is Collaborative Leadership?* (Slide 2).

- Emphasize that “leadership” in this context is a verb, not a noun. This definition presents leadership as a process shared by all the members of a group.

slide 2

What is Collaborative Leadership?

- The processes, activities, and relationships in which a group and its members engage in collaboration.
- Collaboration is defined as “exchanging information and sharing or pooling resources for mutual benefit to achieve a common purpose.”

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- Review *What is a Collaborative Leader?* (Slide 3).

- Emphasize that “leader” is a role that may be shared among members of the group.

Slide 3

What is a Collaborative Leader?

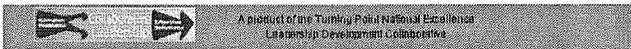
Someone who safeguards and promotes the collaborative process.

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Slide 4

Who is a Collaborative Leader?

Skills	Capacities
Conflict management	Uncertainty
Developing trust	Taking perspective
Communication	Self-reflection
Decision-making	Ego control
Creating safety	
Assessment	



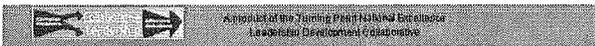
C. Review *Who is a Collaborative Leader?* (Slide 4).

- Explain that these skills and capacities were identified through research with academia, key informant interviews and literature reviews.

Slide 5

Why is Collaborative Leadership Important?

- Most public health problems are complex, interdependent, and messy.
- These type of problems require a systems approach with diverse input and multiple perspectives.
- Many sectors need to “own” the solution for it to be successfully implemented.

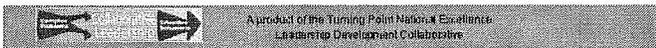


D. Review *Why is Collaborative Leadership Important?* (Slide 5).

- Provide examples of public health problems: teen pregnancy, water quality, chronic diseases, and communicable disease control.
- Issues are not clear-cut, nor are the solutions.
- Root causes are unknown or so massive that one agency or sector within a community cannot effectively deal with problems of this scope independently.
- Stress the need to collaborate in order to share information and resources to enhance the capacity of another to achieve a common goal or good.

Slide 6

Six Practices of Collaborative Leadership



E. Introduce *Six Practices of Collaborative Leadership* (Slide 6).

1. Make the following points:
 - Because collaboration is challenging, it takes special skills to create and sustain it.
 - There are a number of critical skills and capacities collaborative leaders should possess.
 - Many are not unique to Collaborative Leadership.

- F. Review *Six Practices of Collaborative Leadership* and how the six practices were chosen (**Slide 7**), based on the information from page 3 in *Introduction and Overview*.

Slide 7

Six Practices of Collaborative Leadership

- Identified by the Turning Point Leadership Development National Excellence Collaborative
- Research included:
 - Literature reviews
 - Individual interviews
 - Focus groups
 - Expert panel debates
 - Attendance at leadership development training programs

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- G. Define and explain each practice (**Slide 8, Participant Guide, p. 1-2**).

- **(AE) Assessing the Environment:** Understanding the context for change before you act.
 - The capacity to recognize and understand other perspectives.
 - Facilitating connections and identifying clear and beneficial change for all participants.
 - Setting priorities and identifying barriers and obstacles.
- **(CC) Creating Clarity:** Defining shared values and engaging people in positive action.
 - Commitment to a cause that transcends the self.
 - Recognition of a spiritual reality or imperative, ethical and moral standards that provide guidance.
 - Developing a shared vision based on common values.
 - Helping people develop confidence to mobilize (take positive action).
- **(BT) Building Trust and Safety:** Creating safe places for developing shared purpose and action.
 - A two-way street—in order to build trust, you must be trustworthy.
 - Necessary for open expression of ideas, questions, and raising doubts.
 - To be successful this takes communication skills—those skills that enhance trust and promote respect.
 - A previous history of working together successfully in limited capacities allows partners to develop trust and respect for one another.

Slide 8

Six Practices of Collaborative Leadership

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- **(SP) Sharing Power and Influence:** Developing the synergy of people, organizations, and communities to accomplish goals.
 - Participants in the decision-making process need to be empowered in order to contribute fully.
 - The energy of participants focused on a goal generates power; power is not a finite resource.

- **(DP) Developing People:** Committing to bringing out the best in others and realizing people are your key asset.
 - Maximizing the use of other people's talents and resources.
 - Building power through sharing power.
 - Giving up ownership and control.
 - Coaching and mentoring to create power in others that increases leadership capacity for the whole group.

- **(SR) Self-Reflection:** Being aware of and understanding your values, attitudes, and behaviors as they relate to your own leadership style and its impact on others.
 - At "the heart" of all the other practices: Self-reflection is internal while the others are external.
 - The ability to gain insight from one's own experience or action to try to assess the significance of what has happened.
 - Personal CQI—Continuous Quality Improvement: the capacity to engender a never-satisfied attitude that supports setting goals for personal development and learning.

H. Explain the Collaborative Leadership model (visual representation):

1. The collaborative process is triggered by a complex problem (left arrow), which enters the system through either Creating Clarity (CC) among a group or Assessing the Environment (AE) through a formal needs assessment process.
2. These practices are interactive and dynamic, often influencing each other in unplanned ways.
3. They are necessary to finding and implementing an effective solution (right arrow).

3. Module Purpose and Objectives

Learning Objective: Increase understanding of the purpose and learning objectives of this module.

A. Refer to and review *Module Purpose and Objectives* (***Participant's Guide*, p. 3**).

4. Self-Reflection Skills: Self-Assessment

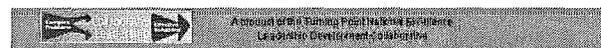
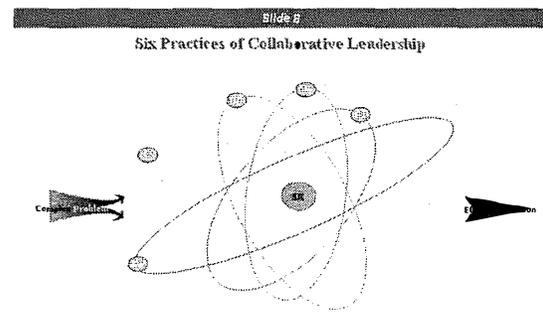
Learning Objective: Identify the skills and qualities associated with the collaborative leadership practice of Self-Reflection.

- A. Distribute *Collaborative Leadership Self-Reflection: Self-Assessment Exercise* and ask participants to complete by reflecting on their own skills related to assessing the environment.
- B. Ask them to rate their Behavior Frequency for each item.
- C. Tell them that they will use the information from self-assessment when completing a learning plan at the end of the workshop.
- D. Debrief by asking: “Based on what we’ve been discussing in this workshop, how does this feedback (self-assessment) relate to being a Collaborative Leader?”

5. Conceptual Overview: What is Self-Reflection?

Learning Objectives: Examine the concept of Self-Reflection as a practice of collaborative leadership; identify the relationship between emotional intelligence leadership competencies and self-reflection.

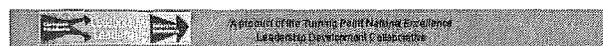
- A. Display The Six Practices of Collaborative Leadership (Slide 8).
- B. Make the following points:
 - Self-Reflection is at the heart of Collaborative Leadership; it is woven through all the other practices;
 - Interviews with successful collaborative leaders reveal it to be one of the most important practices, underlying all other skills.
- C. Review *Self-Reflection* definition (Slide 10).
- D. Part of the self reflective process of a collaborative leader is the notion of continuous quality improvement (CQI). It is a “never-satisfied” attitude that orients a collaborative leader to lifelong personal learning. Throughout the training we will be employing some abridged versions of CQI tools used by effective collaborative leaders.



Slide 10

Self-Reflection

Being aware of and understanding your values, attitudes and behavior as they relate to your own leadership style and its impact on others.



- E. Explain that Goleman's model of Emotional Intelligence (EI) fits well with the concept of self-reflection as a practice of Collaborative Leadership:
- Since a collaborative leader's role is to "safeguard and facilitate the process of Collaborative Leadership," his/her success depends on *how* he/she does that.
 - EI concept is based on Daniel Goleman's synthesis of job analysis and brain research; it has given insight into how the most effective leaders understand their own emotions and those of others around them.
 - EI competencies are not innate talents, but learned abilities.
 - No one leader, no matter how outstanding, has all strengths across the board in all EI competencies.
- F. Refer participants to *Emotional Intelligence Leadership Competencies, Participant's Guide, p. 5* and point out that "awareness" (akin to "reflection") is the first step in both personal competence and social competence. Ask them to take a moment to read it.

6. Leadership Reflection Timeline

Learning Objective: Examine emotional intelligence leadership competencies and their relationship to personal Collaborative Leadership skills.

- A. Tell participants that they are going to have a chance to reflect on their own leadership competencies.
- B. Refer participants to *Leadership Reflection Timeline, Participant's Guide, p. 6* and ask them to read the three paragraphs and the instructions, and then complete the timeline.
- C. Tell participants that when they have completed their timelines, they should answer the reflection questions on the following page (*Participant's Guide, p. 7*).
- D. Make the point that this exercise employs the CQI tool of journaling/writing down their impressions during this exercise.
- E. Debrief by asking the following questions:
- What do you think about the process of self-reflection?
 - What insights did you have about your leadership competencies?

7. Collaborative Process Observation and Reflection

Learning Objective: Increase observation and self-reflection skills by identifying verbal and non-verbal behaviors that impede and facilitate effective collaboration.

- A. Explain activity.
1. Explain that they will be looking at both the self-reflection *process* (how to) and *content* (what to reflect on), **but focusing primarily on the leader's process of self-reflection.**
 2. The definition of self-reflection emphasizes awareness of verbal and non-verbal attitudes and behaviors.

3. Observation—both of self and others—is a CQI method we'll use to practice self-reflection techniques.
4. This is not meant to be a lesson in communication or group process skills, per se, but rather an exercise in **the observation of skills for the purpose of practicing self-reflection.**

B. Introduction. Tell participants that:

1. The role of Collaborative Leader (role played by workshop facilitator) is to facilitate a diverse group toward common goal.
2. For our purposes, we'll model a group collaboration process but focus on the Collaborative Leader's self-reflection process that follows.
3. As participants watch, their role as observer is to reflect on the process on two levels:
 - a. How the members of the inner circle feel
 - b. How you would feel and react as if you were the facilitator

C. Preparation for fishbowl activity.

Facilitator's Note: Alcohol risk reduction is the topic for discussion in this activity. If this topic is not relevant to your audience, choose one that is and apply the same format. (See How to Write a Role Play, *Introduction, Overview, and Resources*, p. 9)

1. Review *Fishbowl Instructions, Participant's Guide*, p. 8.
 - a. There are seven people in the inner circle:
 - Collaborative Leader of this group (played by facilitator)
 - Teenager
 - Parent
 - School representative
 - Police officer
 - Public health department representative
 - Liquor store owner
 - b. The situation: An alcohol prevention coalition is meeting for the first time to decide on a strategy to reduce teen alcohol use. There is only enough funding to go with one strategy.
 - c. The goal for today's meeting: Begin a discussion about which alcohol risk reduction strategy to choose.
 - d. Outer circle's focus: Observe the Collaborative Leader's facilitation of the group process; critically assess effective and ineffective behaviors.
 - e. Allow discussion among the inner circle to go on for about 10 minutes. Discussion will probably end before consensus is achieved.
2. Choose six volunteers for roles (or randomly distribute slips of paper: six with names of roles on them. You, as facilitator, keep the role sign that says Collaborative Leader) and give them each a sign with his other role on it with a piece of tape attached.
3. Distribute short role descriptions to role players. (*Facilitator's Guide*, p. 13)

4. As the Collaborative Leader, you will be modeling some effective and some ineffective group process techniques as you conduct a brainstorming session. For examples, see *Brainstorming Skills Chart, Facilitator's Guide, p. 14.*

Facilitator's Note: It is best to start with effective techniques and then move to ineffective techniques.

5. Move chairs into two circles: an inner circle with seven chairs for the role players; an outer circle for the rest of the group who will observe the process.
 6. Have role players tape their role signs to their chairs.
 7. Instruct participants to turn to *Observation Notes, Participant's Guide, p. 9.* Reinforce that they will be focusing on you as the Collaborative Leader and imagining themselves in that role.
- D. Conduct the role play for about ten minutes.
- E. Debrief the Collaborative Leader's self-reflection process. **Important:** The goal is to understand the effect of his/her leadership on group process, not to focus on facilitation techniques and tips.

The Collaborative Leader (facilitator):

Share with the group what questions you would ask yourself about your behaviors, attitudes and values after the process. Examples might include:

- How did I feel?
- What are my hot buttons?
- Did I lead the way I wanted to? If not, why not?
- Were my behaviors and values consistent?
- Did the group respond the way I expected them to?
- How did I handle unexpected reactions?
- What did I do well?
- What would I do differently next time?

To the inner circle (role players):

- How did you feel as I facilitated this discussion?
- What surprised you?
- Did I lead the way you wanted me to lead the group discussion? If not, why not?

To the outer circle (observers):

- What behaviors were effective? How do you know that?
- What behaviors were ineffective? How do you know that?
- What questions should you, as the Collaborative Leader, ask yourself to help you understand the impact you had on the group process?

- F. Reflection question (silent, individual): Refer to *Self-Reflection: Fishbowl, Participant Guide, p. 10.*
- G. Make the point that they were employing the CQI tool of observation of self and others in this activity.

8. Tools for Continuous Quality Improvement (CQI)

Learning Objective. Explore a variety of continuous quality improvement (CQI) tools.

- A. Say: “We have explored two CQI tools today: journaling/writing and observation of self and others. What are others that you are aware of or use?”
- B. Write “Journaling” and “Observation” on a piece of chart paper. Brainstorm other methods. Ask what they like about that method. Add the following, if not mentioned:
 - Peer support
 - Meditation/Prayer
 - Exercise (e.g., run, go to the gym, yoga)
 - 360-degree feedback process
 - Coaching and mentoring
 - Reading
- C. Refer to *CQI Tools, Participant’s Guide, p. 11*.
- D. Have participants turn to a person next to them and discuss *Self-Reflection: CQI Tools, Participant’s Guide, p. 12*. Point out that peer support is a CQI tool.

9. Develop a Personal Learning Plan: Self-Reflection

Learning Objective: Increase competency in self-reflection using outcomes of self-assessment and awareness of resources for extended learning.

- A. Say: “Collaborative Leadership development is a personal growth process involving a change in mindset and habits. And there are proven methods for making these kinds of changes.”
- B. Display and review **Slide 11** Methods for Change. Say: “Also, there are resources to support you on your journey.”
- C. Refer to and review *Readings and Resources, Participant’s Guide, p. 13*.
- D. Describe learning resources on Collaborative Leadership. Web site (www.collaborativeleadership.org).
- E. Refer participants to *Personal Learning Plan, Participant Guide’s, p. 15*. Ask participants to review their self-assessment Behavior Frequency score to set learning goals and plan for achieving them.
- F. Work through an example with the participants, if appropriate.

Slide 11

Methods for Change

- Exposure to different ideas
- Exposure to different cultures
- Experience/Practice
- Self reflection (e.g. logs, journals)
- Mentoring/Coaching
- 360 Assessment, shadowing
- Peer Support



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- G. Remind participants that they are engaging in self-reflection, one of the Collaborative Leadership practices that is at the heart of any personal change process.
- H. Refer to *Module Purpose and Objectives*, **Participant Guide**, p. 3, and summarize module.

Role Descriptions

Teenager: Adversarial. Thinks adults are too quick to blame kids for alcohol problems. Thinks of alcohol problems strictly in terms of alcoholism.



Parent: Wants school to crack down on drinking at school functions. Wants more alcohol education in classroom. Wants tighter enforcement of teen DUI.



School representative: Supportive of alcohol and drug education but wonders about funding. Thinks entire community needs to support risk reduction.



Police officer: Can't enforce alone; needs help of parents. Supports local ordinance that would hold parents responsible for alcohol-related problems when they have left their children alone.



Public health department representative: Supports a comprehensive approach involving all segments of the community; sees need for more teen input and buy-in.



Liquor store owner: Defensive. Business is legitimate. Parents need to do more to control access to alcohol. Teens need to obey underage drinking laws; store isn't at fault when IDs are fake.

Brainstorming Skills Chart

Brainstorming Skills	Ineffective Verbal Behavior	Ineffective Non-Verbal Behavior	Effective Verbal Behavior	Effective Non-Verbal Behavior
Listens and encourages full participation	Arguing Debating Ignoring the quiet Focusing on the talkative	Poor eye contact	Acknowledges feelings, thoughts by repeating back; asks for ideas	Good eye contact Head nods and cocks to side Leans forward
Explains rules to group	Doesn't explain; jumps right in with no preamble	Looks down Arms crossed	Explains rules of brainstorming; Writes focus of meeting on a chart	Good eye contact Open body posture
Doesn't allow evaluation of ideas	Allows criticism of ideas	Agitated voice tone	Focuses on issue	Calm voice tone
Handles conflict	Counter-attacks Defensive Adversarial Passive	Rolls eyes	Acknowledges and summarizes feelings of others; focuses on issue not person	Smiles Leans forward Closer proximity
Questions effectively	Closed Leading Blaming "Why" Person blaming	Frowning	Open Goal-focused "What" and "How" Problem-solving	Leans forward Nods
Expresses appreciation	Positive judgment Non-specific ("You're great!")	Forced smile Condescending tone	Acknowledges w/ "I" statements about specific behavior Appreciation equal	Warm smile Closer proximity