Tools
FOR LEADERSHIP AND LEARNING:
BUILDING A LEARNING ORGANIZATION

2002 / THIRD EDITION

National Managers' Community
La communauté nationale des gestionnaires

Canada

The National Managers' Community is supported by a Secretariat and a Council made up of representatives from regional manager networks and the National Capital Region. They provide leadership and support to managers across the Federal Public Service by acting as an advocate, facilitator and information broker.

For information on how to obtain additional copies of this publication, visit the *Café Exchange with Bob Chartier* on the National Managers' Community web site:

http://www.managers-gestionnaires.gc.ca

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Foreword

As Champion of the National Managers' Community, I am proud to present the third edition of *Tools for Leadership and Learning*.

This publication represents various tools and practices that are being used by managers and practitioners throughout the public service. They help us to build our capacity to understand and master the changing roles that come with a knowledge-based economy and society. They provide us with some practical and easy to use methods for engaging others in dialogue and building a learning organization culture.

To me, the most exciting thing about this publication is how it illustrates that the public service is an organization in which we learn from each other, sharing tools and techniques to build a work environment that values personal initiative, innovation, team playing, learning and trust. I particularly want to thank the author of *Tools for Leadership and Learning*, Bob Chartier, for so generously sharing his knowledge and skills so that we can pass this work on to public servants across Canada.

The fact that we are printing a third edition, demonstrates that it has been a really valuable resource for public service renewal over the past few years. We are pleased to present you with some of the tried and true tools of the earlier editions as well as some exciting new tools to help you to be the best manager the public service has to offer!

Michael G. Nurse
Associate Deputy Minister
Public Works and Government Services Canada

Author's Acknowledgements

This toolkit was originally inspired by DIAND Deputy Minister Scott Serson's early and continued vision to build a leadership and learning culture. This support has continued with subsequent Deputy Ministers, including the new Deputy Minister Alain Jolicoeur and Assistant Deputy Ministers Carolyn Davis and Gordon Shanks.

The support of the National Managers' Community under the leadership of Michael Nurse and Adèle Colby has led to the publishing of this third edition of *Tools for Leadership and Learning*.

I am delighted that the book we created will now be available across the public service, and I hope you will find it helpful.

This small toolkit was meant as a stimulus and as a basic guide. It cannot capture all the details, the technical requirements and the follow-through necessary to make these suggestions work. Please consult the new *Blueprints Field Guide* for details on planning, design and facilitation. For more in-depth learning and understanding, resource references are provided at the end of the toolkit.

Finally, I would like to dedicate the spirit of this publication to the memory of Bill Alexander, an early Canadian pioneer in the study of learning organizations and a fine public servant.

Bob Chartier
The National Managers' Community Council
www.managers-gestionnaires.gc.ca

Introduction

To change the way people think about something, it is sometimes best to start by changing the way people act. We are on the road to making the public service a learning organization. We have begun to build a consensus for a partnership that is based on leadership and learning. In this partnership, accountability is shared between managers and all other employees. Such a dynamic environment requires input from people at all levels and in all types of jobs when there are decisions to be made and where new ideas are needed. This book provides some of the tools that will enable every part of the public service, its partners, clients, and the Canadian public we all serve, to benefit from the learning, experience and creativity of all its employees.

Tools for Leadership and Learning is divided into seven sections. Each answers a specific learning organization challenge by presenting tools that enable leaders to tap the team's collective wisdom and to share decision-making.

The seven sections are:

- Shared Vision and Values
- Personal Mastery
- Systems Thinking
- Mental Models
- Team Learning
- The Learning Vessel
- The Art of Conversation

The tools described under each section can be as simple as a 12-minute, one-on-one meeting between supervisor and employee, and as in-depth as a three-day consultation with clients, partners, and members of the Canadian public. Most can be done simply and cost-effectively by any work unit.

Each tool is described in simple detail that answers the following questions:

What is it?
Why should I use it?
How can this tool help?
How does it work?
What resources do I need?
What is the leadership edge?

Why are leadership and learning important?

All of us in the public service are knowledge workers. This means that, instead of coal, diesel fuel and wood, it is information and learning that we use to get the job done. Instead of widgets, cars and canned food, it is information and knowledge that we produce. We are not alone in this. It is not land, labour or capital that makes Ottawa high-tech companies competitive. It is the amount of new knowledge they produce every day. Our public service is no different.

Without effective learning, there can be no new knowledge.

About this book…

This book is meant to stimulate your creativity. It should help you to initiate activities that will promote leadership and learning in your group. Use it as a springboard to create your own leadership tools.

To make the most of our learning, public servants at all levels must share leadership responsibilities. As government adjusts to current economic and social realities, public service employees are being called upon to work at steering, not rowing, the boat. Our role is to enable Canadians to achieve the collective goals set for this country. We do this by working to realize a mission, not to enforce a policy. We measure our success in outcomes such as results and graduates, instead of inputs such as people in classrooms. We seek not only to solve problems, but to prevent them.

We know we do not have all the answers. Through shared leadership, we gain the insight of many people, each of whom may have part of the answers we seek.

The goals of this toolkit are to enable you and your colleagues to build knowledge every day and to share the challenges, triumphs and vision of leadership. With these tools and your experience, we can build a public service that is even better. The tools are in your hands.

Shared Vision and Values

Personal Mastery

Systems Thinking

Mental Models

Team Learning

The Learning Vessel

The Art of Conversation

Getting Started

The valuable work of Peter Senge and colleagues at the Massachusetts Institute of Technology (MIT) have given us a framework for building learning organizations that take us much further than a re-working or beefing up of the existing training model. There are seven core disciplines to his vision of a learning organization. This toolkit is framed around these core disciplines and is meant to be an introduction and a simple entry into the new world of managing and building a learning organization.

Shared Vision and Values

By far, the biggest struggle of the learning organization is to get the vision and values of the organization off the wall and into the hearts and minds of the people. If traditional organizations tend to be overly led by policy, then learning organizations look to be primarily led by shared vision and values. Shared vision is quite simply your reason for existence. We have become experts at crafting the one or two paragraph, highly word-smithed, motherhood style mission statements backed up with lists of very high quality values. Some are done with passion and commitment, some for compliance. The real challenge is not in the drafting of vision and values but in making them real in terms of accountability, passion and relevance in the mailroom and every other corner of the organization.

Some good tools to help get vision and values off the wall include:

- The Team's 30-minute Mission Statement
- The Team Charter – Community Charter
- The Future Search
- Communities of Practice
- The Values Audit
- Appreciative Inquiry

WHAT IS IT?

A process that invites everyone in a group to develop a personal mission statement and contribute to the group's mission statement.

WHY SHOULD I USE IT?

To help every employee in your group gain a full understanding of the work you are in.

HOW CAN THIS TOOL HELP?

While mission statements are important, they gain value only when they are understood by all members of a group. Each individual must be able to see the link between his or her work and the group's overall mission. By developing a team mission statement and contributing to the larger group's mission statement, each employee can see how daily work contributes to larger goals.

HOW DOES IT WORK?

Planning

This process should be done in the context of the annual *Team Charter*. Look for *Benchmark* mission statements from similar organizations. A facilitator should allow full participation by all team members and help develop an understanding of how a team mission statement can help everyone focus on the "big picture."

Doing

Use the template on the following page to enable each staff member to compose a personal mission statement. Come together as a group to review all

"Most organizational mission statements are nothing more than a bunch of lovely PR platitudes framed on a wall.

However, a mission statement has the potential of being a living constitution – something that is based on timeless principles."

Stephen Covey

the personal statements, reach a consensus on the best ideas from each, and create a team mission statement for the group.

Following up

Every staff member should sign the mission statement. Post it in a prominent location in the workplace and review it every year as you develop your *Team Charter* to see if it is still relevant in light of the changes that affect your group and work teams.

What resources do I need?

Meeting room, mission statement templates, flip charts, and a facilitator. If you can use a facilitator, it is more likely that all members of your team will participate actively, which will limit the time needed for the process. You might want to consult the book *The Instant Manager* by Cy Charney. It suggests a clear, focused and accurate approach to developing a team mission statement, using his version of the following template.

What is the leadership edge?

Some mission statements use vague wording and seem to be "one-size-fits-all" statements that do not relate to the real work that people do. That is why many employees wonder what their group's mission statement has to do with them. By linking the team's mission statement to each employee's daily work and by involving everyone in developing the team's mission, this process ensures that the wording and impact of your team's mission statement is meaningful.

Team Mission Statement Template*

Who: ______________________________
Your team's name

What: ______________________________
____
Your Work

How: ______________________________
____
Your quality, timeliness, cost-effectiveness and service requirements

For: ______________________________
____
Your partners, clients

Where: ______________________________
Your province or territory

Why: ______________________________
____
Who benefits from your work?

Download from our web site:
www.managers-gestionnaires.gc.ca

*Template reproduced with permission from Cy Charney.

The Team Charter – Community Charter

“ **Leadership and learning are indispensable to each other.**”

John F. Kennedy

What is it?

A one or two day meeting to set your group’s course for the year. It is not your work plan, it is how you will work together.

Why should I use it?

It is a team agreement.

To involve all staff in setting achievable values, standards and protocols for your group.

To build team spirit and enthusiasm for the group’s goals.

To give your team or community a set of concrete improvement goals against which they can measure real progress.

How can this tool help?

This tool, originally developed by Sandy Thomson of the Department of Indian Affairs and Northern Development’s BC Region, enables every member of your team to see the "big picture" and suggest ways to apply it to everyday work. It is the vital link between your team vision, the organization vision and the daily work of getting things done.

HOW DOES IT WORK?

Planning

Share information with your staff about your work plans and existing charter elements if you have them. Use a facilitator.

Doing

Have the facilitator focus your team on its:

- Mission statement
- Workplace values
- Service standards
- Code of conduct
- Roles and responsibilities
- Protocols – meetings, decision making, dispute resolution
- Business lines – products and services
- Skills inventory
- Team improvement goals

Brainstorm each subject and build a team consensus on each. Together, the team's products on these subjects will form your *Team Charter*.

A half day checkup after six months will let you see how on track you are. After 12 months, you can focus on: things to stop doing, things to continue doing, and things to start doing.

> "In life, always tell yourself that things are fine as they are, but would be even better if they were different."
>
> Jean-Paul Filion

Following up

Some teams like to laminate the resulting document and post it by the copy machine where it reminds people of their individual commitment to the team.

What resources do I need?

A minimum of one day or a maximum of two days, a facilitator, a meeting room, and additional rooms if the group is large.

What is the leadership edge?

By involving all of your employees in this critical activity, you will help change your group from one that relies on policies and job descriptions to one that bases its actions on principles and teamwork. The *Team Charter* is a tool that makes the team responsible for coming to grips with the group's business lines, workplace principles and strategic goals.

The Future Search

What is it?

A process of bringing everyone who has a stake in a program or activity together to create a shared vision for it and to plan future activities and strategies.

Why should I use it?

To help stakeholders such as your group's clients, employees and partners find common ground.

To set new directions for the future of your work.

How can this tool help?

This tool is very good for a project or strategy that is just beginning. It helps people with very different interests work collectively to think-out a future that works for everybody. It is a quick way to build a powerful group or community vision.

How does it work?

Planning

Create a planning committee. Invite all the stakeholders and state the subject of the conference. It is important to use a skilled facilitator.

Doing

The facilitator will invite the group to focus on the history of the project or strategy. They should include global, group and personal events and factors that have influenced its state today. The group then focuses on the present, by writing down things about the project or strategy that have worked for them and things that have not worked. The goal is to focus on the future.

"It's not so much that we're afraid of change or so in love with the old ways,

but it's the place in between that we fear ...

It's like being between trapezes.

It's Linus when his blanket is in the dryer.

There's nothing to hold on to."

Marilyn Ferguson, American futurist

Following up

The higher the level of participation, the better the follow-up will be. If less than 100 percent of your stakeholders participate, you will have to try to bring the rest of the organization or the community into the process. Task teams, newsletters, follow-up sessions, and a commitment to action from the leadership will all help to ensure good follow-up.

What resources do I need?

Plan on taking two or three days for the exercise. A facilitator and meeting room(s) will be required.

What is the leadership edge?

By getting everyone in at the beginning of your planning process, you eliminate the need to seek everyone's "buy-in" after the fact. This is a way to kick-start a renewal venture with a high energy, participative effort that builds morale.

Communities of Practice

What is it?

It is a group of people who come together around a shared core of knowledge or enthusiasm.

You could have a community built around technical fields such as IT or audit practice. You could also have a community centred around management or facilitation or research.

Why should I use it?

This tool supports professional learning, benchmarking best practices, problem solving, horizontal management, and recruitment and retention across organizations and programs.

How can this tool help?

This could be your number one knowledge development tool. A *community of practice* grows knowledge both inside and outside your organization.

How does it work?

Planning, Doing and Following up

- A *community of practice* is different and usually larger than a team but team type values usually inform the community. Communities are informal, set their own leadership and agendas and participants join on their own.

"Never doubt that a small group of thoughtful committed citizens can change the world. Indeed, it's the only thing that ever has."

Margaret Mead

- The first step is to identify potential communities and to recognize the strategic value in bringing a community together. Communities organize, thrive and succeed through leadership, yet because they are informal they usually lack organizational legitimacy.
- *Communities of practice* need management's financial and time support to survive.
- *Communities of practice* can meet physically or virtually or both.
- *Communities of practice* need to be grown, they cannot happen overnight. As they grow, they self evaluate and determine whether to carry on or fold and regenerate in another form.
- *Communities of practice* must use new tools themselves (e.g. *Open Space*, *Workout*) in order to keep alert and fresh. The community also becomes the base for an emerging knowledge bank.

What resources do I need?

Management support, IT support and strong facilitative leadership.

What is the leadership edge?

Communities of practice give leaders access to a broader base of knowledge for problem solving, knowledge generation, continuous learning and recruitment of new people and ideas.

The Values Audit

WHAT IS IT?

It is a team technique designed to get management of values off the wall and into daily practice.

WHY SHOULD I USE IT?

Use this tool to bring equal discipline to values management as brought to budget management.

HOW CAN THIS TOOL HELP?

This tool helps you and your staff see the reality of your efforts to be values led. By way of this annual audit you are able to have a conversation with your team members around your strengths and weaknesses on values.

HOW DOES IT WORK?

Planning, Doing and Following up

- The first prerequisite is to have already identified your team values in a *Team Charter*. If you have not already done so, forget this audit and build a *Charter* with your team.

- If you have the *Charter* then you want to recommend your first *Values Audit* sometime in the first year of the *Charter*. You will need a half-day at minimum, a full day if possible.

- Don't hesitate to do it in the workplace. Your memory and consciousness about values issues will be stronger there.

"Thinking is work."

Roy Thomson, Newspaper Publisher

- Put the large list of your values up on a wall. Start with the positive hits. Brainstorm as many situations as possible where individuals or the team lived up to or demonstrated positive examples of those values.

- Now the tough part. Brainstorm situations where we did not live up to those values or fell short. This calls for skilled facilitation, as you want to keep it situational not personal.

- The final part is to open the conversation up around improvement. How can we avoid the negatives, build on the positives and identify other values that have surfaced in the audit that we should add to the *Charter*.

What resources do I need?

Strong facilitation and flip charts.

What is the leadership edge?

This tool reassures your people and those above you that you are not just in compliance with values based management but that you are in fact giving it high priority and that you are struggling together at the team level to ensure that your workplace culture is driven by the values that have now come down off the wall.

Appreciative Inquiry

WHAT IS IT?

Appreciative Inquiry (AI) is a positive generative change approach that works on the assumption that whatever you want more of already exists in all organizations. Unlike traditional problem-solving processes, *AI* engages the entire system in an inquiry about what works. Through the inquiry we discover the life-giving forces of the organization, analyse it for common themes and shape it into dreams of "what could be" and "what will be". The organization maintains the best of the past by discovering what it is and stretching it into the future.

WHY SHOULD I USE IT?

Appreciative Inquiry invites employees at all levels to engage in a collaborative discovery of what makes their organization effective – in economic, ecological and human terms. This dialogue stirs up energy, creativity and excitement and leads to the co-creation of a vision of the future based on what is best about the organization. The *AI* process answers the question “How do we take what already works in pockets of this organization and help it grow and take hold in all of the organization?”

"EVERYONE HAS A STORY TO TELL."

BARRY BROADFOOT, CANADIAN ORAL HISTORIAN.

HOW CAN THIS TOOL HELP?

Appreciate Inquiry creates an environment where rank is set aside, dialogue happens, and the future is built on the best from the past. It creates a momentum of positive energy across the whole organization.

HOW DOES IT WORK?

AI methodology consists of four phases, the Four "D's": Discovery, Dream, Design and Delivery.

In the *Discovery* phase we get clarity on the issue at hand and determine, after careful consideration, what are the questions that will guide our inquiry. Teams of interviewers spread out into the organization in search of "good news" stories: what are the positive experiences people have had in relation to this issue in this organization?

From the stories gathered in the interviews, themes emerge and they become the inspiration for the *Dream* phase where we determine "what might be" based on the best of the past experiences.

In the *Design* phase we ask the question "what is the ideal?" We do this by using mental imagery techniques and drawing our dream on paper. As a group, you discuss your dream picture and decide how to put it in writing in the form of a "provocative proposition."

The *Delivery* phase entails finding innovative ways to create the *Preferred Future* described in the *provocative propositions*. Any strategic and operational planning methodology can be used as long as the *AI* principles are followed: i.e. inclusion of all levels of people in the organization at all critical stages of the process and a positive mindset (rather than a negative "we will fix this problem" mindset).

What resources do I need?

All the players (representatives from all levels of the organization), a large meeting room, as many flip charts as breakout groups, background music for the visualization exercise in the *Dream* phase, coloured markers and various craft supplies to create visual images of the *Preferred Future*.

What is the leadership edge?

Develop your ability as a leader to identify the positive core of your team, your division or your organization. Once this positive core is identified, it becomes the foundation for supporting your mission, achieving your objectives and goals and creating innovative strategies to move forward.

Personal Mastery

The second core discipline in learning organization practice is how well we build capacity for each employee to pursue and develop *personal mastery*. *Mastery* can be best understood in that old fashioned sense of continuous learning of skill and craft. We produced master carpenters and master teachers. Couple that sense of mastery with the search for personal vision and its alignment with the workplace vision and you now have employees in pursuit of *personal mastery*. Without it you have hard working competent employees stuck in basic compliance and job description purgatory. A commitment to *personal mastery* ensures that people are motivated by more than fear, promotion and money. Most would prefer continuous learning, doing high quality work and being recognized as people.

Some good tools to help us build *personal mastery* in our people would include:

- The 12-minute Briefing
- The 12-minute Interview
- 360-degree Feedback

The 12-minute Briefing

WHAT IS IT?

A fast, to-the-point management briefing by the person who knows the most about the subject in question.

WHY SHOULD I USE IT?

- To avoid preparing long, detailed briefing notes on minor points.
- To avoid involving a lot of extra people when answering a straightforward question.

HOW CAN THIS TOOL HELP?

When a senior executive needs information about points in a discussion paper, a *12-minute Briefing* from the person who is the expert on that subject can cut down on the need for memos and additional briefing notes. Instead of the Deputy Minister asking the ADM for more information, and the ADM asking the Director General, who asks the Director, who asks the Policy Officer, who sends the information back up the line... the Policy Officer (or whoever is the expert) could prepare a short briefing note and meet with the Deputy for a *12-minute Briefing*. Ask for one if you have questions that need factual or technical responses, or other quick responses.

HOW DOES IT WORK?

Planning

Think about offering a *12-minute Briefing* whenever a question from someone further up the system can be answered simply and quickly by a person in the know. Technical and factual questions can be handled well in 12 minutes, so can a request for background information about a process, or the views of one of your partners.

"WHAT THIS COUNTRY NEEDS IS NOT MORE LEADERSHIP, IT IS MORE PARTNERSHIP, MORE PARTICIPATION BY THE PEOPLE IN THE DECISIONS THAT AFFECT THEIR LIVES."

GEORGE WOODCOCK, CANADIAN AUTHOR & SOCIAL COMMENTATOR

Give the person doing the *12-minute Briefing* an opportunity to do a "dry run" of the briefing with his or her supervisor. This can give all concerned reassurance that the message is clear, succinct and accurate.

Doing

The person who will be doing the briefing needs to focus on key points and limit background information to five minutes, so that the person who requested the briefing can ask questions. The whole process should take no longer than 12 minutes. If *12-minute Briefings* turn into major meetings, people will be reluctant to participate. Senior managers may feel that they should do them instead of delegating them to more junior employees. Officers may be concerned that the briefings have turned into major events where they will be asked about subjects out-side their areas of expertise.

Following up

Once you and some of your colleagues have done *12-minute Briefings*, it will become part of your workplace culture. You will save time and energy on meetings and briefing notes.

WHAT RESOURCES DO I NEED?

To give a *12-minute Briefing*, you need a short briefing note and some preparation time.

WHAT IS THE LEADERSHIP EDGE?

The *12-minute Briefing* makes senior managers more approachable. It can also offer them insight into what is happening at the front-line level.

The 12-minute Interview

WHAT IS IT?

A regular meeting with an employee to talk one-on-one about issues, problems, and progress in work and the workplace.

WHY SHOULD I USE IT?

To make sure that all of your employees have direct contact with you.

To avoid losing touch with people, programs and projects when you are extremely busy.

To make sure that the "regular" one-on-one meetings you plan with your employees actually take place.

HOW CAN THIS TOOL HELP?

Surveys show that one of the top five concerns of front-line staff is a lack of direct contact with their supervisor or manager. This tool helps you build that meeting time into your daily routine.

HOW DOES IT WORK?

Planning
Structure the time you spend with staff. Create a rotating schedule so that, for example, every day before lunch, from 11:48 to 12:00, you meet with a different member of your staff.

Doing
Be firm about the time – 12 minutes at the set hour. Don’t try to control the session; what is important will come up.

"I come from a history of "I don't know, what do you think?"

Audrey McLaughlin

Following up

Once you make the *12-minute Interview* part of your workplace culture, you will have greater control of your time. Your staff will keep note of questions, problems and issues that can be addressed during their regular interview and ask for special meetings for more urgent or complex matters.

What resources do I need?

Twelve minutes per day. If you have 10 employees, for example, each employee could meet with you every 10 days.

What is the leadership edge?

Talking to your staff regularly encourages each employee to contribute to the team effort. If you invest time in your people, the work will be in much better hands.

360-degree Feedback

WHAT IS IT?

An informal process to involve peers, employees, partners, suppliers, and supervisors in a team performance evaluation.

WHY SHOULD I USE IT?

To expand your evaluation process from a management-centred activity that focuses on compliance to a team-centred activity that focuses on improving performance.

To focus performance evaluation more on improvements and less on past mistakes.

HOW CAN THIS TOOL HELP?

By involving the whole team, the *360-degree Feedback* process provides a comprehensive evaluation of performance on a team basis rather than on an individual basis. The team receiving the evaluation can be assured that the assessment reflects much more than one powerful person's subjective opinion. This goes beyond the scope of the traditional, formal, performance-assessment process.

HOW DOES IT WORK?

Planning

The *360-degree Feedback* process is new and largely untested, so it will be necessary to do some research and to devise a format that suits

"THERE ARE TWO WAYS OF EXERTING ONE'S STRENGTH:

ONE IS PUSHING DOWN, THE OTHER IS PULLING UP."

BOOKER T. WASHINGTON

your needs. For example, you may decide to obtain feedback from all team members through a phone poll, or through an E-mail questionnaire.

Take time to learn about this process with your team. Look for a *Benchmark* practice from other departments. Have a *Workout* on how your group can apply the *Benchmark* and modify it to suit your needs. Get everyone comfortable and involved from the start. Get some training on effective feedback techniques to use with colleagues and clients. The team should create the measurement criteria.

Doing

Determine the scope of the evaluation by assessing with whom you want to consult and what standards you want to measure. Make a list of people who could contribute to the process. Then, with their input, link each individual's evaluation to her or his deliverables and improvements achieved, and to any *Service Standards* set for your team. Link individual performance to team performance goals. Speak plainly.

Following up

Ensure that you link each individual's performance to the strategic, deliverable goals in your *Team Charter*.

What resources do I need?

The strategy of obtaining *360-degree Feedback* is fairly new so there are few resources available to guide you as you develop your own approach. Try to find a *Benchmark* practice that you can adapt quickly to your group's needs. If you have to develop a new approach, you may have to invest in some research and consultation activities or hire a professional to design and build a more structured model.

What is the leadership edge?

This tool shares accountability and is an appropriate complement to shared leadership.

Systems Thinking

The third important discipline in building a learning organization is the ability to manage and practice *Systems Thinking*. *Systems Thinking* is fundamentally a shift from seeing organizations and problems as a series of pieces in a puzzle, to seeing the whole puzzle at once. We have to learn how to stop fixing the crisis driven problems and start to fix the system that invariability caused the problem in the first place. *Systems Thinking* requires us to go deeper into a problem to find the root cause. It requires a new world of communication across silos, throughout the organization. *Systems Thinking* insists that all elements of our business be consulted and participate in our business improvement.

Some good tools to help us practice *Systems Thinking* in our workplace might include:

- The Open Space Conference
- The Courtyard Café
- Participatory Research
- After Action Review
- The Five Whys
- The Process Map

The Open Space Conference

What is it?

An approach to large meetings that promotes creative thinking and gets everyone participating.

Why should I use it?

To get new and fresh ideas on old programs. (Internal Consultation)

To hear what your partners and clients have to say and immediately commit to them that you are going to consider their suggestions or act on them immediately. (External Consultation)

How can this tool help?

This tool can help you and your team get away from old thinking and old ideas. Approach it with an open and receptive mind.

How does it work?

Planning

Set up a planning committee and be as inclusive as possible by inviting people who will contribute to developing new ideas. Tell people why you are consulting them and the broad subject area to be covered, and provide background material in advance. Use a facilitator.

Doing

Get the whole group to brainstorm on subjects related to your team's work, identifying issues and problems that they feel need to be addressed. The number of issues identified will determine the number of dialogue groups to choose from in the "marketplace." Then, post a list of issues for each dialogue group's time slot. Let participants choose

"I have discovered in 20 years of moving around a ball park that the knowledge of the game is usually in inverse proportion to the price of the seats."

Bill Veek, Owner, Chicago White Sox

which dialogue group they want to join. After the participants break up into dialogue groups, each group decides which of the issues identified for that time slot it will address, and comes up with five solutions to the issue they have selected. Have one member of each group record the group's suggestions. You might also use note-takers to capture these ideas electronically. After the dialogues, invite everyone back to the main room for the closing plenary.

Following up

Capture recommendations electronically as the day progresses so that you can give people a complete draft document at the end of the session. This is the opportunity for the leadership to commit to actions based on the suggestions received. If they cannot do this, there must be a commitment to review the recommendations and get back to participants with an action plan.

What resources do I need?

A planning committee, a facilitator, a large room for the plenary, and flip charts. You will need about one half day for the process, although the time may be extended if you want more conversation.

What is the leadership edge?

Because there are no leaders in the room, you tap the leadership potential of everyone present while you build a collective, consensus-based agenda.

The Courtyard Café

What is it?

It is a large group conversation and systems tool.

Why should I use it?

To put a large group of people into conversation around a half dozen major themes.

How can this tool help?

Gathers visionary and action based intelligence from a large group in an informal environment.

How does it work?

Planning

- It should work for 100 to 1200 people if the space is big enough.
- Six to eight cafés are laid out in a fan shape from a center courtyard in the middle of the room. Small portable fences delineate the cafés.
- Each café is named after an issue. E.g. the Learning Café, the Workload Café, etc.
- Go crazy with the café motif. E.g. umbrellas, table flowers, candles, large plants, etc.
- Equal number of tables per café with flip chart paper on each table. Each café has a waiter/recorder assigned to keep track of the written material.

"Want to lead with purpose? Serve with your whole heart."

Joe Eastman

Doing

- Needs at least two and one half hours. People choose a café to start. Around the café tables they converse around vision and values of the issue writing a draft on the table paper. After 15 minutes play some jazz and people move to other cafés adding their views into the mix.
- After the first hour, put more paper on the table, repeat the same movement process and provide new instructions to build a number of actions around the issues.
- Coming in and out of the cafés, people pass through the courtyard, which is a neutral zone. Participants may get into conversations in the courtyard that are completely away from the café conversations. Encourage this.
- After you finish the café part, put all participants into a circle in the courtyard with an inner "fish-bowl" circle of the waiters and hosts and one chair for an audience participant.
- Have a *Talk Show* conversation with all about what they found in each of the cafés.

Following up
As with any large group session, follow up depends on front-end expectations. Is this a dialogue session, a strategic planning session or a problem solving session. Follow up will be appropriate to each.

WHAT RESOURCES DO I NEED?

The only special resources would be the café design material.

WHAT IS THE LEADERSHIP EDGE?

This tool allows for exploration of emerging issues in organizations through networks of conversation using core questions that invite individual and collective knowledge and learning. Good for building large group cohesion.

Director General Geoff Munro of Natural Resources Canada stated “This tool is a very inclusive and fun way of getting feedback from a large group of people with diverse skills and knowledge. Working on an agenda with a large number of themes, this tool provided us the opportunity to engage over 100 people in the development of our strategic plan. It brought together staff and conversations in a true systems thinking model.”

Participatory Research

"I FOUND OUT THAT I COULD DO A MUCH MORE EFFECTIVE JOB OF FINDING THE RESEARCH MATERIAL BY LEAVING THE FORMAL SURVEY AND JUST GOING AROUND THE COUNTRY, SITTING IN FARMERS' KITCHENS AND GETTING THE REAL STORY."

MYLES FUCHS, SASKATCHEWAN FARMER/RESEARCHER

WHAT IS IT?

A research tool that empowers citizens to manage the change process in their communities.

WHY SHOULD I USE IT?

Use it as an alternative to the 'expert only' model of research on social policy development.

HOW CAN THIS TOOL HELP?

Classic social policy research centres on the traditional 'researcher'. Citizens are 'participants', 'questionnaire respondents' or 'interviewees'. Researchers get the learning. *Participatory research* is learning-centred, empowering citizens through participation in the learning/research process.

HOW DOES IT WORK?

Planning

Social policy design always has a research component. *Participatory research* has usually been done by non-governmental agencies. *Participatory research* in the public sector is relatively new.

Doing

Participatory research still requires a professional researcher/organizer who manages the process but is committed to building the research inside the community. The research model: the community leadership agrees on a definition of the problem, gathers data, does the analysis and builds a guide to collective action. *Dialogue* is the principal tool of discovery.

Following up

New or regained old knowledge acquired through *participatory research* does not require community 'buy-in', because they were 'in' from the beginning. The community owns the knowledge, and follow-up should reflect the holistic community development process.

WHAT RESOURCES DO I NEED?

Participatory research still requires a basic level of financial and human investment, but it should not be confused with job creation or economic development activity.

WHAT IS THE LEADERSHIP EDGE?

We spend millions on social research in the public sector. *Participatory research* models help turn this investment into community-based continuous learning. As a result, people may regain lost skills, think collectively and innovate through cultural and social development in their own communities.

“If I had to live my life over again, I’d dare to make more mistakes next time.”

Nadine Stair

After Action Review

What is it?

An assessment conducted during or after a project or major activity that allows the employees and leaders to determine what happened and why. It compares intended behaviours and results with actual behaviours and results, identifying what to sustain and what to improve the next time around.

Why should I use it?

After Action Review (AAR) is a live learning process that discovers why things happened, thus avoiding the repetition of mistakes. It identifies performance corrections and improvements and builds a knowledge base of standards and best practices.

How can this tool help?

AAR focuses directly on the tasks and goals, but is not a critique, and does not judge success or failure. It encourages employees to identify lessons learned. It creates an environment where rank is set aside, dialogue happens, and the process improves through active learning.

How does it work?

The *AAR* can happen at the end of a project or activity, or after each identifiable event within a project or major activity. All the players gather to review the events, identifying the activity and having participants outline how their portion of the activity played out. Ask why certain actions were taken, how they reacted to them, when the actions were initiated, exchange lessons learned, what happened from their own point of view, and relate these actions to the final outcomes.

WHAT RESOURCES DO I NEED?

All the players, a meeting room, all available data (memos, telephone transcripts, minutes of meetings) and a facilitator.

WHAT IS THE LEADERSHIP EDGE?

AAR creates an atmosphere of mutual trust, allowing participants to speak freely. Innovation behaviour becomes the norm. Problem solving is pragmatic and employees are not pre-occupied with status or second-guessing what the leader will think. It becomes active learning, allowing you to make corrections as you go.

The Five Whys

"ALWAYS BE SMARTER THAN THE PEOPLE WHO HIRE YOU."

LENA HORNE

WHAT IS IT?

It is a team-based technique designed to get at the root cause of a problem.

WHY SHOULD I USE IT?

You would use this tool to develop a "systems thinking" approach, to problem solving.

HOW CAN THIS TOOL HELP?

This tool helps you see the bigger picture, the whole system, if you will. By asking a series of five *Whys* to a problem, you allow the group to back up their analysis into the other parts of the organization. This brings forward the links and pieces that may have contributed to the problem.

HOW DOES IT WORK?

Planning, Doing and Following up

- Lets say the problem is...high rates of sick leave on a nursing ward.
- Brainstorm a number of symptoms five times.
- For example: Excess overtime on a nursing ward. The first *Why* session picks lack of staff.
- The second *Why* session picks tiredness and burnout as first choice of brainstorm.
- So *Why* are they tired and burning out...well there is shortage of staff these days.

- *Why*? Well, Human Resources has been unsuccessful recruiting in our hospital.
- *Why*? It appears the new training requirements in our provincial training center has affected the number of new students.
- *Why* not recruit from abroad? Turns out there are some Immigration constraints.
- You get back into the root causes.

What resources do I need?

Strong facilitation and time.

What is the leadership edge?

This tool reassures people above you that you have not just put a band-aid on a problem with a quick fix but you have, in fact, gone deeper and even if the changes are beyond your reach, there is now a more systems understanding of what we need to get to the bottom of things.

The Process Map

"PEOPLE ARE BASICALLY WORTHY AND YOU CANNOT UNDERSTAND A SYSTEM UNTIL YOU TRY TO CHANGE IT."

NATIONAL TRAINING LABORATORIES, 1947-62

WHAT IS IT?

A "map" that you create to show all the steps involved in a process that you want to improve.

WHY SHOULD I USE IT?

To review, re-design or improve any process in your group, such as the audit, ministerial docket, or computer help-line processes.

To gain a clearer understanding of how things work and ensure that any proposed improvements take into account every process and every person involved.

HOW CAN THIS TOOL HELP?

This tool brings together people and information that do not usually have opportunities to connect.

What if the problem with your monthly reporting system is that it was designed by and for headquarters staff and does not relate well to work done in the regions? This tool will let you see the problems so that you can solve them.

HOW DOES IT WORK?

Planning

Contact everyone involved in the process, including people from outside your group, and invite them to join a *Workout* to build the *Process Map*.

Doing

Plot each major step of the process along the top of an eight-metre-wide sheet of brown wrapping paper. Along the left edge of the paper, list the people involved in all aspects of the process.

Along the bottom edge of the paper, mark the time line of the process. Use yellow self-adhesive notes to chart every detail of each step and the time each action takes. Use red self-adhesive notes to flag dead zones, but take care not to be critical of participants' work. Take note of anything that restricts the effective flow of the work; these are prime areas for process improvements.

Following up

After the session, send the proposed solutions to the decision makers for a "yes," "no," or "needs more work" response. Implement the solutions that can be done immediately. Let participants know what progress is being made on implementing or adjusting the solutions that could not be introduced right away.

What resources do I need?

The time of the people who are involved in the process and who know it best, an eight-metre-wide sheet of brown wrapping paper, yellow and red self-adhesive notes, markers, and a meeting room.

What is the leadership edge?

You will be able to implement process improvements that have been designed by the people who know the system best. If the process has been done in a positive and constructive way, you will have the buy-in of your own staff and support for the changes from people working in other areas of the group and outside of it.

MENTAL MODELS

Learning organizations have to be able to identify and smash *mental models*. The fourth core discipline, *Mental models,* are those assumptions, beliefs and attitudes that have been embedded in the workplace for years and often go unchallenged because they lie so deep in the heart of the organization. They live below the waterline and are hard to see and get at. They could also be a big factor in the frustration around many large change efforts. Even the best-planned change management process can hit the wall when it bumps up against organizational and personal *mental models*. *Mental models* are also huge barriers for innovation. "We tried that before or our policies will never allow it." If an organization needs to learn it also needs to unlearn. Smashing *mental models* gets the unlearning done in order to create space for the new learning

Some good tools for breaking down *mental models* could include:

- COACHING
- THE TALK SHOW (THE ALTERNATE PANEL DISCUSSION)
- THE L.I.D. TEMPLATE FOR MEETINGS
- THE WIN-WIN TOOL
- THE PRESS CONFERENCE
- PLAIN LANGUAGE

Coaching

WHAT IS IT?

As a leadership competency, *Coaching* focuses on evoking excellence in others. As a learning method, it is action oriented and is based on reflection and insight. A powerful complement and alternative to the command and control model of leadership.

WHY SHOULD I USE IT?

As a leadership competency, to observe and change the workplace culture. As a learning method, to develop a greater awareness of your own leadership potential and effectiveness.

HOW CAN THIS TOOL HELP?

With this leadership competency, you will be able to create a workplace environment in which the principles of learning organizations are applied and in which people are valued as full partners in achieving their part in the mission of the workplace. With this learning method, you will perfect your observation skills and become a more effective leader of people and change.

HOW DOES IT WORK?

Planning

Coaching is not serendipitous. You must make a clear commitment to develop your leadership *coaching* skills.

"KNOWLEDGE SPEAKS BUT WISDOM LISTENS."

JIMI HENDRIX

Like with other leadership competencies you need to learn the language of *coaching*, test your skills in action and be dedicated to practice. Because you can't see yourself in action it is best to work with another committed learner or even with a professional coach to achieve more advanced levels of proficiency in coaching.

Doing

Most of us have learned to be action-action-action oriented. You need to become action-reflection-action oriented to develop this leadership competency. For example:

- Start observing your actions in language: how you make requests and promises, how you make and use assessments and assertions and how your declarations impact actions around you. Use a learning journal for this.

- Do the same observation about people around you and also note this in your learning journal.

- What do you learn about yourself and others from this observation and what different actions will you take based on this observation. You may want to share this learning with another committed learner for accelerated learning on this competency.

Following up

At the same time there are other ways for you to learn the language of *coaching* and how you can continue to develop this leadership competency.

You have access to formal learning programs, for example through CCMD. You can also take advantage of a more informal route by becoming a regular user of *Coaching Connection* – The Leadership Network's website (http://leadership.gc.ca/coaching)

WHAT IS THE LEADERSHIP EDGE?

Some argue that a fundamental difference between managing and leading is the degree of ability to evoke something greater in people than they may believe possible. Breakthrough *coaching* in the arts, science and sports will do this. Breakthrough *coaching* in people management has the potential to elevate leadership to a new level.

"I believe Marx was only off by a suffix; it's not communism that can save us but communication."

Krist Novoselec

The Talk Show (The Alternate Panel Discussion)

What is it?

An energetic alternative to the panel discussion.

Why should I use it?

You have number of subject experts you want to hear from but you want to do it in a way that builds dialogue between them and your audience/staff/delegates.

How can this tool help?

The traditional panel discussion is very flat. Three big problems: the panel is usually at the front of the room, it is often elevated, and it generally faces a theatre-style audience that by structure is forced to engage the front of the room, not each other.

How does it work?

Planning

- Determine *Talk Show* guests and audience. Guests could be a group of senior managers, perhaps subject matter experts or a diverse group representing differing views your audience needs to hear and engage (citizens, clients, partners, etc.).
- Set the room up in a horseshoe modelled as in *Open Space*, with the guests as part of the circle.
- Engage a neutral, skilled host/facilitator.

Doing

The host engages the audience, introduces the subject and guests, and begins taking questions and comments. Opening remarks, without speeches or presentations, are optional. The skilled facilitator keeps it moving, engages all guests and promotes lively dialogue.

Following up

Closing comments with a future focus are critical. Scribed main points could be distributed later to participants. If constructive dialogue is the only desired outcome, leave it at that.

WHAT RESOURCES DO I NEED?

A comfortable room, circled chairs, flip charts, facilitator and perhaps coverage of any guest expenses.

WHAT IS THE LEADERSHIP EDGE?

Too often accountability sessions with leaders or experts can turn nasty (bear pit) or long-winded (traditional panel). This tool promotes dialogue not only with leaders but also with each other as audience members.

The L.I.D. Template for Meeting

"DON'T LOSE YOUR HEAD TO GAIN A MINUTE. YOU NEED YOUR HEAD, YOUR BRAINS ARE IN IT."

BURMA SHAVE ROADSIDE ADVERTISEMENT, 1925-1963

WHAT IS IT?

A format that could be useful for regular management meetings or the annual retreat. *LID* implies the session will be 1/3 learning, 1/3 information and 1/3 dialogue.

WHY SHOULD I USE IT?

In a word, balance. Too often management meetings tilt too far in one area – for example the 'information dump'. Many meeting audits show senior managers spending up to 80% of meeting time listening to presentations, with little time left for real dialogue and sometimes even less for new learning.

HOW CAN THIS TOOL HELP?

It offers a framework for new discipline around 'deck' management and meeting design. It can ensure that knowledge in the room gets engaged through dialogue. It also insists on time for new learning, essential for accelerated leadership.

HOW DOES IT WORK?

Planning

The discipline of the three equal parts ensures that planning is a broad participatory process, not driven solely by individual agendas.

Doing

Participatory leadership ensures management team buy-in on design and engagement. Time management, focus and smart tools make sure the broader structure works.

What resources do I need?

None in particular except to keep in mind that you need to get everyone to understand the process and to contribute to its success.

What is the leadership edge?

Better meetings at the top will ensure better meetings down below.

The Win-Win Tool

"ONLY BY VENTURING INTO THE UNKNOWN DO WE ENABLE NEW IDEAS AND NEW RESULTS TO TAKE SHAPE."

MARGARET WHEATLEY

WHAT IS IT?

A facilitator-led exercise in which the groups on each side of an issue look at the other side's point of view to try and resolve problems and challenges in ways that are acceptable to all.

WHY SHOULD I USE IT?

To help the people on each side of an issue understand the other side's perspective from a mediation, rather than a negotiation point of view.

HOW CAN THIS TOOL HELP?

This process starts and ends with respect for others' points of view. It can build bridges of understanding between groups who thought they were too far apart to communicate effectively. With understanding can come new ideas and solutions.

HOW DOES IT WORK?

Planning

This tool is useful where there are two groups and two points of view or sides to a question. Bring in a facilitator who does not have a stake in the issue and who is not associated with either group.

Doing

The facilitator asks Group A to think about what principles, practices, and resources they believe Group B needs to reach agreement. The group outlines their understanding on flip charts. In another room, at the same time, Group B looks at the same issue from the point of view of Group A and notes their understanding of Group A's needs on flip charts.

The groups switch rooms to see what the other side thinks they need. With a different colour marker they edit, add and modify the other group's outline. Each group then uses the materials prepared by both groups to present their new understanding to each other.

Following up

With a clearer understanding of the views of the other side, the groups are ready to begin deliberations with no uncertain agendas or interests. Consider posting the flip chart notes in the workplace to keep everyone on track.

WHAT RESOURCES DO I NEED?

A facilitator, two hours or less time for all concerned, two meeting rooms, two flip charts, and coloured markers.

WHAT IS THE LEADERSHIP EDGE?

This is a quick and easy approach to finding out what each side in a situation needs to reach consensus. The approach shows respect for the other point of view and a willingness to put your team in a position where it has to consider the other side's view as well as its own.

The Press Conference

"MAN WHO SAY IT CANNOT BE DONE SHOULD NOT INTERRUPT MAN DOING IT."

UNKNOWN

What is it?

An alternative to the long-winded guest speaker.

Why should I use it?

Use it when you want to hear from someone, but you fear the long presentation, the guest is not a great speaker, or you are more interested in the audience reaction to the material.

How can this tool help?

It puts your organization and the audience, instead of the speech-writer, in charge of the learning.

How does it work?

Planning

The room design that works best for this tool is round table groupings. Also needed: a skilled facilitator and a thorough briefing of the guest beforehand.

Doing

You invite the presenter and the audience to what is billed as a *press conference* on a given issue. The audience is grouped at, say, eight tables. You ask the guest to take a maximum of fifteen minutes to present the eight most critical challenges or options around the main issue. Each table then takes one of the challenges and brainstorms 2-3 hard journalistic questions on that issue.

A table spokesperson asks the question, and the table as a group is responsible for listening intently to the presenter's response and keeps a good set of journalist notes. These notes could then become your round of proceedings.

Following up
Each table files a small report that when linked with other tables' reports creates an account that represents – more fully than a speech – the full extent of the guest's knowledge of the issue.

What resources do I need?

A skilled facilitator, a meeting room with round tables, and paper for note-taking.

What is the leadership edge?

This tool makes the audience more responsible for seeking the right information, defining the focus, and subsequent learning. Guests also increase their leadership quotient by moving away from flat, prepared text into dialogue and depth on a subject.

“Get to the point as directly as you can; never use a big word if a little one will do.”

Emily Carr

Plain Language

What is it?

It is an alternative to our growing addiction to wordiness, jargon, legalese and insider language.

Why should I use it?

It helps you communicate more effectively with citizens and the people with whom you work. It reaches people who may not read well. It helps all readers better understand what you are saying. It helps avoid misunderstanding and error. Best of all, it saves time by doing it right the first time.

How can this tool help?

Plain language brings clarity. Plain language is inclusive. Plain language brings increased understanding. Plain language gets the communication job done.

How does it work?

Planning:

- Determine that plain language usage is a value on your team and in your work. Put it in your *team charter*.
- Have everyone learn the techniques and skills of plain language practice.
- Build it into each project. Remember it isn't a “dumbed down” version of what you have to say, it is good writing crafted with focus and clarity.

Doing:

Use readability assessment tools to monitor your text. Develop a set of writing service standards.

Continue to build a jargon free workplace that will then influence the work products such as letters, forms, notices, instructions, policy statements and safety manuals.

Following up:
Use outside editorial help to give feedback on product readability. Invite client response through surveys to get feedback on readability. Build a culture of writing improvement.

What resources do I need?

A good training course, a set of guidelines and the will to change.

What is the leadership edge?

Much better communication with those with whom you work and those for whom you serve.

Team Learning

One of the most basic *mental models* is that most learning is centered on the individual. We went to school as individuals, we generally take courses, seminars or attend conferences on our own. This works fine for us personally but it is not as effective when we begin to require new learning in a team based environment. It is frustrating to go to a seminar, learn something new and come back to a team that does not understand the new knowledge you have learned. Applying the fifith discipline, Team Learning, learning organizations try to find ways to build continuous learning into teams in order to maximize knowledge management and promote faster learning.

Some good tools to promote *team learning* in organizations could include:

- The Learning Team
- The Stand-up
- The Workout
- The Interview Matrix
- Camp Re-Boot
- The Brainsqueezer

The Learning Team

WHAT IS IT?

A self-directed work team or a special team of 6 to 10 people who help each other meet individual, group and departmental learning goals.

WHY SHOULD I USE IT?

To enable a team of employees, as well as each individual, to take responsibility for continuous learning.

To strengthen your team.

To make the most of limited training resources and tie training to your changing group goals.

HOW CAN THIS TOOL HELP?

It puts employees in charge of their own learning plans and resources, and fosters shared leadership in a team environment.

HOW DOES IT WORK?

Planning

Each member of the *Learning Team* signs a contract of commitment. The team may focus on specific skills such as preparing spreadsheets, or on broad subjects such as managing change.

Doing

Each member teaches one session in a rotating cycle. After any member attends a conventional training program, he or she shares the learning with the other team members.

"THE PRESENT PREOCCUPATIONS WITH BODY BUILDING AND CHARACTER MOULDING ARE USELESS AND MAY EVEN BE DANGEROUS SO LONG AS WE NEGLECT AND STARVE THE MIND."

HILDA NEATBY

While sessions should be no longer than 90 minutes, the group sets the session length and the frequency of get-togethers. The *Learning Team* must meet regularly and consistently. Like all effective workplace activity, the *Learning Team* must be supportive, flexible and fun. Members can also serve as coaches to one another in the workplace.

Following up

Learning Teams assess their own value and their will to keep moving ahead.

WHAT RESOURCES DO I NEED?

The *Learning Team* should have a budget so that individual members and the group as a whole can access conventional training and other learning supports. They will also need a place to meet.

WHAT IS THE LEADERSHIP EDGE?

Learning should be a strategic tool, not just a means of acquiring skills. Faster, more focused learning can boost the quality of your group's work.

The Stand-up

What is it?

A regular, standing-up, 15-minute team session.

Why should I use it?

To make sure that you – and everyone you work with – are "in the loop," aware of all the important things in your workplace that affect you and your work.

How can this tool help?

If people in your group often ask "Why am I never told?" or complain that it is sometimes hard to know what is going on in the group, the *Stand-up* is a quick and easy way to make sure that everyone is up-to-date. Unlike a traditional staff meeting, there is no time for long descriptions of the progress of each person's work. Everything you hear during a *Stand-up* should be of interest to you.

How does it work?

The *Stand-up* requires a shared understanding among the members of your group about what this "anti-meeting" should accomplish and how it works.

Consider making one *Stand-up* meeting each week a Blue Sky exercise, where the focus is not on day-to-day issues, but ideas for the future, or "Blue Sky" issues. At this meeting, everyone brings new approaches and innovative plans.

"IF WE DON'T SPEAK TO EACH OTHER, WE RISK NOT UNDERSTANDING EACH OTHER."

CLAUDE CHARRON

Record all ideas on a flip chart. Don't go over 15 minutes, but if no one is contributing, end the *Stand-up* early. Do not let a Blue Sky session turn into a regular *Stand-up* session. Be sure to keep track of ideas and follow up. When you implement a Blue Sky idea, let people know!

Planning

Meet regularly. A daily session is a great habit to establish, but you should meet your own group's requirements. There is no chairperson and no agenda. You don't even need to book a boardroom, just meet in a central location where everyone has room to stand. If you have a major issue to resolve, don't bring it up at the *Stand-up*, call for a *Workout*, a problem-solving session. In other words, raise only those items that concern the whole group.

Doing

Better to say nothing than to talk about something of no concern to the group. Don't outline your own day's work.

Keep it simple, optimistic, focused and fun. Talkers learn to listen; listeners get to talk.

Following up

Use the information you get during the *Stand-up* to help a colleague that day. Make the *Stand-up* part of your everyday workplace culture.

What resources do I need?

A large enough space for all employees to stand. You need no more than 15 minutes for a *Stand-up* meeting. As for how many times a week you meet and when, your group should decide this together.

What is the leadership edge?

The *Stand-up* promotes increased workplace neighbourliness: taking you back to a time when people said "Hello" to each other in the morning instead of immediately hunkering down to their computers. A quick, daily meeting helps the team leader keep information fresh. It also evolves into work sharing and back-up work arrangements.

The Workout

> "Our present problems cannot be solved at the level of thinking at which they were created."
>
> Albert Einstein

What is it?

A problem-solving session that brings together experts on a specific subject from inside and from outside the group.

Why should I use it?

To involve the people who have to implement and develop solutions.

To get fast decisions on critical issues.

How can this tool help?

Too often, problems are not resolved because the right people are not around to deal with them, or because the person who has the problem does not feel she or he can ask for help. This tool gives everyone in your group the power to say, "I need help with this."

How does it work?

Planning

Let everyone know that they can call a *Workout* and make sure that your leadership supports the process. Choose a workable number of participants for their knowledge and skills rather than because of their status or location. Make sure that you all agree to work on only that one issue. Hold the *Workout* in your workplace so that it will be seen as a part of the everyday culture, not a special event. Send participants a reading package in advance of the *Workout*.

Doing
During the *Workout*, have the group brainstorm on the challenges associated with the problem and then find common themes among them. Then invite them to suggest possible solutions and identify best practices. Fine-tune the recommendations for presentation to decision makers.

It is important to remember that the *Workout* team is not the implementation team. The *Workout* does not change the responsibilities of existing work teams.

Following up
In a "joint forum," present to the decision makers the solutions proposed by the *Workout* participants.

After choosing a solution, the decision makers must communicate the new principles and practices to the rest of the group.

What resources do I need?

A facilitator, a meeting room, and enough time to analyze the issue and explore a number of solutions.

What is the leadership edge?

The *Workout* is a key tool in developing a participative work environment. It demonstrates dramatically that anyone can be a leader and that we all have a role in leadership.

“TIME IS THE LEAST THING WE HAVE OF.”

ERNEST HEMINGWAY

The Interview Matrix

WHAT IS IT?

A tool to build dialogue in small groups (fewer than 40 people).

WHY SHOULD I USE IT?

It is one of the more powerful ways to get the whole group engaged in dialogue, with equal air-time, focus and consensus building as the main elements.

HOW CAN THIS TOOL HELP?

It quickly brings a working group to consensus, without everyone making mini-speeches at each other around a table, as often happens in meetings.

HOW DOES IT WORK?

Planning

The *Interview Matrix* is based on units of four. You need four questions, four flip charts, and starting groups of four people in each group.

Doing

- Begin from a circle of the whole. No tables. One flip chart in each corner of room.
- Determine with the group four best questions. One question goes on each flip chart.
- Break large group into smaller groups of four (each person is assigned a number 1 to 4 and thus owns one of the four questions). Each

participant has a template with their number, the question, and space for the results of three upcoming interviews.

- There are six rounds of one-on-one interviews: Sequence: (1-2, 3-4) (2-3, 4-1) (2-4, 3-1) (3-2, 1-4) (4-2, 1-3) (2-1, 4-3)

- The second component is the editing stage: one's go to flip chart #1 and compare notes, two's go to flipchart #2, and so on.

- In the third component, the whole group visits each corner and comments on what they can and can't live with. Consensus is built.

Following up

As with any problem solving session, after consensus comes action planning and task assignment.

WHAT IS THE LEADERSHIP EDGE?

This tool gets people working at speed with focus and full participation. It is a must in most *Workout* situations.

Camp Re-Boot

"WHAT LEARNING IS: YOU SUDDENLY UNDERSTAND SOMETHING YOU'VE UNDERSTOOD ALL YOUR LIFE, BUT IN A NEW WAY."

DORIS LESING

WHAT IS IT?

A learning/team building session that grounds employees in the values, ethics, business lines, objectives, processes, relationships and tools in their particular public sector workplace.

WHY SHOULD I USE IT?

Two reasons: first, to improve existing employee orientation programs; second, when organizations have had or will have massive change, e.g., downsizing, reorganization, etc.

HOW CAN THIS TOOL HELP?

It can help reinforce corporate messages to new and veteran staff. The best camps have a diagonal slice of participants. Everyone is on the same page, talking about core business and core values in a team building setting, with a focus on improving skills such as presentation, problem solving, negotiation and communication.

HOW DOES IT WORK?

Planning

Use internal resources and a learning consultant to build your curriculum based on corporate messages and needs. Make space for adequate feedback to improve each session.

Doing

- The pilot was based on an out-of-office four-day (Monday noon to Friday noon) session.

- Element of recreational team building coupled with professional facilitation.
- Workplace leaders could contribute as teachers, and clients could have a valuable contribution.

Don't send people cold: have a one-day corporate business line review or HR orientation before attending *Re-Boot*.

Following up

Form *learning teams* and *communities of practice* at camp and meet monthly after camp to maintain relationships and new learning. Reinforce post-camp learning on your Intranet site. Consider a shorter 'son of *Re-Boot*' session yearly to check results. Reflect *Re-Boot* themes in future staff learning plans.

What resources do I need?

Financial needs will depend on location choices and scope, staff time and availability.

What is the leadership edge?

Puts leaders and staff in a diagonal-slice continuous learning situation. People see the other side of the fence and their role in the value chain, creating leadership opportunities at all levels.

"My door is always open."

Sadie Baker – Squamish

The Brainsqueezer

What is it?

A match-up between a long-time employee who is retiring from the group and an employee working in an area where the more experienced person's knowledge needs to be maintained.

Why should I use it?

To make sure that, even if you have a high number of people retiring, their wealth of knowledge and awareness of departmental history will not leave with them.

How can this tool help?

This tool demonstrates clearly that you value your people, those with long experience and those at the beginning or mid-points of their careers. It says "What we do here every day matters!"

How does it work?

Planning

Make it clear to participants and other staff that this is not a succession program. Therefore your choice of who on the remaining staff should become the *Brainsqueezer* can be based on what area of your group would benefit most from the knowledge transfer. This is not a power transfer.

Doing

There must be a contract between the two participants that commits them to the amount of time and closeness necessary to make this arrangement work. Their desks could be moved together; they could attend or host meetings together; and they should review files together. Skills and insights must be shared. If you have picked the right person as the *Brainsqueezer*, he or she will have an impact on the team as the new holder of long-term, specialized knowledge.

Following up

The impact of using the *Brainsqueezer* tool is to send a clear message to staff that knowledge acquisition is an important part of the job and that you support the process of transferring knowledge.

What resources do I need?

You will need to free up some time from each person's workload, for about six months. Office space for two people is also needed.

What is the leadership edge?

You retain strategic advantage by capturing and transferring long-term intelligence into the new wave of staff. You also show respect for departmental knowledge and the need to keep it on-site.

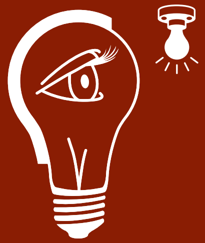
The Learning Vessel

To build a framework for organizational learning you need three basics: you need some Guiding Principles such as ideas from learning organization theory; you need methods and tools such as suggested in this guide; and you need what Senge calls "innovations in infrastructure". For example, the space inside an organization can reflect the Dilbert World or be a model for collaborative learning. Infrastructure is not just bricks and mortar; it is also the policies, reward systems, strategic planning process and other structures that determine your workplace culture. Without a systemic commitment to improvement these structural elements can continue to thwart change. Without participatory, learning-based structural reform, people will remain disconnected, uninspired and stuck in the status quo.

Some tools to bring innovation to organization structure could include:

- Benchmarking
- Daily News
- The Survey
- Service Standards
- The Learning Centre
- The Focus Group

Benchmarking



What is it?

A team-based search – through new research or by looking at the practices of other successful organizations – for new, effective ideas and approaches that you can apply to your work.

Why should I use it?

To continuously stack up your work against the best in the business so that you set excellence as the standard for your group's work.

How can this tool help?

While this tool can help your group aim higher, it can also unearth timesaving practices, new and simpler procedures, and innovative strategies that can save you time and money.

How does it work?

Planning

Keep it simple. Create a *Benchmarking* team to do the work and make sure that team members have the training support they need. If you know that other groups have developed effective strategies that you can use, feel free to contact them and "steal" their ideas. After all, what could be more efficient? If you have to do more extensive research, restrict your search to information resources that are easy to access or close at hand.

Doing

Benchmarking can be as simple as a site visit to learn another group's best practices. A more formal approach would include a series of interviews with people in another group or organization.

“I AM CONVINCED THAT, IF THE RATE OF CHANGE INSIDE AN ORGANIZATION IS LESS THAN THE RATE OF CHANGE OUTSIDE, THE END IS IN SIGHT.”

JACK WELCH, CEO, GENERAL ELECTRIC, 1993

For example, if you know that a group at Industry Canada is getting results that you want to achieve, you might ask to meet with the supervisor and one or two officers in the group. After an initial meeting, some people in your group might meet one-on-one with their counterparts in the other department. You might ask for access to policies, guidelines, forms or other tools that the group uses in its planning or its day-to-day work. You can then determine how much of Industry Canada’s approach you can “steal” and where you need to adjust these approaches to adapt them to your own environment and your particular challenges.

Following up

Apply what you learn to your workplace.

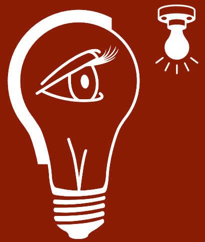
WHAT RESOURCES DO I NEED?

The *Benchmarking* team will require time. They may also need funds for travel and research expenses.

WHAT IS THE LEADERSHIP EDGE?

Leaders who do *Benchmarking* are seen to be committed to learning, to managing change, and to front-line participation in the learning process.

The Daily News



What is it?

A one-page E-mail to everyone in your group on what is happening today.

Why should I use it?

To link all the units in your group.

To share information about work.

To build teamwork by adding humour and good news about people and current events to the daily routine.

How can this tool help?

Does your group seem to be "stove-piped," that is, does information flow upwards, but not across the organization? Is there no sense of the units being hooked together at one point? The *Daily News* can be good for morale if it maintains a sense of “professional playfulness.”

How does it work?

Planning
You need to commit to producing the *Daily News* every day. Make arrangements for a backup editor in case the regular editor is not available.

Doing
Your *Daily News* could include news clipped from your local paper that relates to your group’s mandate. It could also include a roundup of meetings and events in your building today, as well as milestones such as birthdays, rewards and recog-

"NO EXECUTIVE HAS EVER SUFFERED BECAUSE HIS SUBORDINATES WERE STRONG AND EFFECTIVE."

PETER DRUCKER

nition. It might also include a daily joke or cartoon and perhaps even staff classifieds and notices.

The key is to have people in your group let your group communicator know about news and events. The person who writes the *Daily News* should not have to do research.

Following up

The *Daily News* has to be published regularly, so that people will expect it and miss it if it is not there. Keep it simple, relevant and fresh.

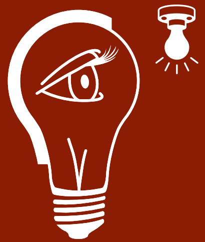
WHAT RESOURCES DO I NEED?

You need an E-mail system with a group function. You will also need a volunteer who enjoys writing and who can take an hour in the morning to collect materials.

WHAT IS THE LEADERSHIP EDGE?

Leaders can be regular contributors to the *Daily News*. You can use it to promote dialogue on issues and to invite feedback. Make sure that everyone knows that you read it daily.

The Survey



What is it?

A *Survey* of team members to assess the group's effectiveness. A *Survey* of clients and partners to evaluate program effectiveness and service quality.

Why should I use it?

To get feedback from your team partners and clients, and to evaluate your performance.

How can this tool help?

A *Survey* provides data and feedback that you can count on. It is current, relevant and as useful as the questions you ask.

How does it work?

Planning

Create a small team to develop the *Survey* by contacting several people in the group that will be surveyed, and asking what key issues should be included. Use plain language for the questions, and test them out with a few people to make sure they are clear and lead to meaningful answers. If you wish, you can hire a professional to develop and administer the questionnaire.

Doing

A *Survey* can help you assess the effectiveness of a product or service, or the satisfaction of your employees or partners.

"I ALWAYS GO WHERE THE PUCK ISN'T... YET."

WAYNE GRETZKY

Following up

It is critically important to follow-up on the results of your *Survey*. Bring the results to the whole team for analysis. Incorporate the findings into your annual corporate and team strategic plans. By making and announcing changes, you signal to all that you value their input and are committed to excellence.

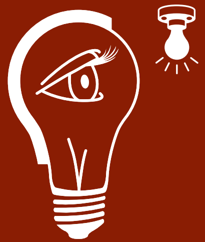
WHAT RESOURCES DO I NEED?

A telephone *Survey* involves long-distance costs. A mail *Survey* involves postage costs for the initial mail-out and for reminder notes. While a *Survey* created in-house can cost relatively little, you may need the help of a professional for *Survey* design and analysis. Because a *Survey* can be a simple 10-question exercise or an extensive interview, the resources needed will vary according to your requirements.

WHAT IS THE LEADERSHIP EDGE?

A *Survey* is valuable when you are making a decision that affects the people you serve. A team *Survey* lets you know if you are improving, staying the same or experiencing problems as you move toward a performance-based team environment. A *Survey* gives you a higher level of communication with your partners, clients and staff; a greater field intelligence; and a current database that can help you set priorities.

Service Standards



WHAT IS IT?

A process of involving the people you serve in setting a standard target for the quality and quantity of your group's services and products.

WHY SHOULD I USE IT?

To begin or strengthen a dialogue with your partners that will lead to improvements in your products or services and increase your partners' satisfaction.

To get back in touch with elements of your work that perhaps you have not thought about in a while.

HOW CAN THIS TOOL HELP?

This tool applies a "real-world" test to your group's standards and practices. In the future, you won't just think that you are meeting people's needs, you will know that is the case.

HOW DOES IT WORK?

Planning

Choose a workable number of participants, including your clients and partners, for their knowledge and skills rather than because of their status or location. Involve employees from each key area of your group.

Doing

Use a facilitator to help participants look at the things in the workplace that can be measured. Participants can check how well the group is able to deliver against clients' needs that have been identified – is there a higher standard to which

> "BE A LEADER YOURSELF, THOUGH YOU ONLY LEAD YOURSELF, FOR EVERY LEADER STARTS BY FIRST LEADING HIMSELF."
>
> NORMAN BETHUNE

employees can strive? Once you have identified a standard, check staff members' ability to deliver. Look at constraints and opportunities, determine how performance can be measured, such as through a client *Survey*, and determine whether the necessary activities and changes are affordable.

After setting the standards, measure the extent to which your group is already meeting them, perhaps through another client *Survey*.

Following up

Communicate the new standards to staff and clients in plain language. Give staff any additional training they may need to meet the new standards. Recognize and reward progress.

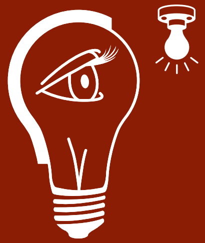
WHAT RESOURCES DO I NEED?

Time, a meeting room, access to some of your partners and clients, a facilitator, and the support of your managers.

WHAT IS THE LEADERSHIP EDGE?

The process of developing *Service Standards* can give you and your staff a greater understanding of your work processes. It can also increase individuals' pride in performance while it increases client satisfaction. All of this can and should lead to improved morale.

The Learning Centre



What is it?

A learning-resource room that serves the needs of your group.

Why should I use it?

To show in a concrete way that yours is a "learning organization."

How can this tool help?

If the *Learning Centre* is a comfortable place, it will make it easier for people to take the time they need to look into learning opportunities, do a little extra reading, or plan a learning activity with their colleagues. It is not enough for groups to say that they foster continuous learning. Groups must support people in their efforts to learn.

How does it work?

Planning

Choose a room, large or small, that you can dedicate to creating an atmosphere of strategic learning. Fill it with relevant books, tapes, papers, articles, a computer for self-tutoring, a TV hooked-up to a VCR, and learning tapes. Make it a room that invites learning. Let people know that, in a knowledge economy, the currency is learning and this is the bank!

Doing

Make the *Learning Centre* a vibrant, interesting and changing place. Do not let the *Centre* become an old-fashioned, dusty library with 10-year-old policy manuals on the shelves. Let people know that the room is available to them for impromptu

"THE PURSUIT OF LEARNING IS REALLY THE PURSUIT OF FINE LIVING."

J. ROBY KIDD

meetings and for the work of *Learning Teams*. It can become a place where *Workouts* can take place and where *Learning Teams* feel they can get real work done, unlike the atmosphere in some boardrooms.

Following up

If you use the *Learning Centre* and support your staff's use of it, it will be vibrant; if left alone, it will surely become the first thing to be cut if budgets are reduced.

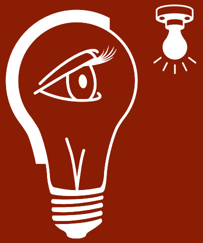
WHAT RESOURCES DO I NEED?

Space (try to convert a third of your existing board-room into a *Learning Centre*), whatever material you can afford, and the commitment of one or two people part-time to make sure that it changes and grows.

WHAT IS THE LEADERSHIP EDGE?

A commitment of time and money to a *Learning Centre* demonstrates your respect for learning and knowledge.

The Focus Group



What is it?

A group of your employees, partners or clients that you bring together with a facilitator, to get their views about any new ideas that you want to introduce.

Why should I use it?

To test out ideas for new approaches that would have an impact on employees, suppliers or partners.

To get people's reactions to your ideas or products.

How can this tool help?

A *Focus Group* determines the "Why?" behind client or employee comments like "That wouldn't work for us" and "It's too much trouble." It can also offer surprising information about why "This is exactly what we need!"

How does it work?

Planning

Select a representative group of about 6 to 12 of your employees, partners or clients and invite them to participate. Use a facilitator from within your organization or hire an outside professional. Choose a convenient location and try to keep the

"WEAVING A NET IS BETTER THAN PRAYING FOR FISH."

ANCIENT CHINESE PROVERB

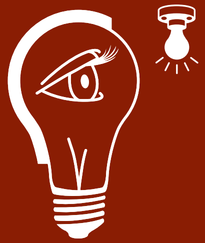
Focus Group session under three hours. Provide refreshments. Do a pre-test: test out the questions that you plan to ask with one or two colleagues.

Doing
Your skilled facilitator can bring a number of intelligence gathering tools to the process. The *Interview Matrix* works really well in this context.

Following up
Use the results of your *Focus Group* to fine-tune the changes you have planned or, if you receive a strongly negative reaction, consider a whole new approach. *Focus Groups* are not designed to let you know what percentage of the whole group of clients, for example, would object to a policy change. But they can tell you if some of your clients would object so strongly that the change may not be worthwhile.

WHAT RESOURCES DO I NEED?

Focus Groups can be expensive if there is travel involved or if you have to pay the participants. You will need refreshments and a meeting room. It may be preferable to select one outside your work site. A professional facilitator will involve consultant fees.



WHAT IS THE LEADERSHIP EDGE?

A *Focus Group* can save you the cost and problems associated with launching a new policy, developing a communication strategy, or making changes to which employees, clients or partners may object. It can, instead, help you make changes that are more likely to be well received.

The Art of Conversation

If the previous six disciplines form the core of learning organization practice, then the art of conversation, the seventh discipline, could be the glue or even the soul holding it all together. Conversation is the practice of deep, reflective listening, speaking when moved, suspending ones assumptions and building shared meaning in conversation rather than argument. Conversation is not discussion, debate, persuading or getting “buy-in”. Conversation is the entry point and the building block of organizational thinking and action.

Today’s organization strives for improved communication. Generally this has led to more managed communication with its emphasis on key messages, press releases and word smithing. The new hero of the managed communication world is the passionless, bulleted PowerPoint. Conversation, however, brings us back to the risk of thinking together, the creativity of the *workout* process and the passion of the leaders’ story.

Some tools that could help us with getting to a more dialogue based organization could include:

- The Meeting Audit
- The Facilitated Conference Call
- Storytelling for Leaders
- The Accountability Agreement
- The Dialogue
- Interest-based Negotiations

The Meeting Audit

What is it?

A tool to find out how you are doing with problem solving, communication and decision making.

Why should I use it?

Many believe we can improve the effectiveness of how we work together, but others still don't see it. Like a financial audit, a *Meeting Audit* gives a clear picture of the bottom line on effectiveness inside the meeting room.

How can this tool help?

It can give us an objective analysis of something we do every day yet seldom with the critical analysis we give other aspects of our work.

How does it work?

Planning

Simplicity is the key. Objectivity is the qualifier. Results give it the juice.

A. Have a small list of five audit questions, e.g.,

- How much time in the meeting was spent talking about things in the past?
- How much air-time did each participant get?
- Percentage of time on-issue, off-issue?
- Leadership of session: how much time spent being facilitative? directive?
- Consensus time spent: how accomplished?

"THERE IS NOTHING SO USELESS AS DOING EFFICIENTLY THAT WHICH SHOULD NOT BE DONE AT ALL."

UNKNOWN

B. Train a small group of auditors and have them available to audit meetings. Build audits into management contracts to ensure use of auditors. Train them in observation (stopwatch, recording and diplomatic reporting).

Doing
Market the new audit process well. Make sure its spirit focuses on improvement and good will, not strict compliance.

Following up
Be ready with new tools to help people that see the *Meeting Audit* as a call for improvement.

WHAT RESOURCES DO I NEED?

Management support, audit team and follow-up support.

WHAT IS THE LEADERSHIP EDGE?

The *Meeting Audit* is a valuable tool to measure how successful you are at changing meeting format.

Facilitated Conference Call

What is it?

A way to make conference calls more effective. It combines the low-tech effectiveness of facilitation with the high-tech speed and cost-effectiveness of the conference call.

Why should I use it?

Use it for the same reason you use facilitation instead of the conventional '*chairing*' of a session. You get skilled session management, focus and greater participation.

How can this tool help?

It frees the Chair to be part of the solution instead of the process. This also eliminates 'Chair pull', where the Chair influences direction. It brings a professional process to sessions that get people involved and bring them back enthusiastically next time.

How does it work?

Planning
Begin by knowing what type of session you want: problem solving, dialogue or presentation of new material. Bring in a facilitator early for design advice and to define what you need to get from the session. Use in-house facilitation.

Doing
Give the facilitator full rein to manage the process. The facilitator should hold back the big talkers and bring forward the reluctant. Keep it

"A LOT OF PEOPLE SPEND TIME TALKING TO THE ANIMALS BUT NOT THAT MANY PEOPLE LISTEN. THAT'S THE REAL PROBLEM."

WINNIE THE POOH

simple. Work for consensus. A technical twist could be to have a scribe with PowerPoint charts (as flip charts) e-mailing instantly to participants.

Following up

After consensus, get decision points, action plans and follow-up leadership. Agree on decision, record and distribute.

WHAT RESOURCES DO I NEED?

Skilled in-house facilitation, proper audio-conferencing equipment, e-mail and PowerPoint or Lotus Notes (if desired).

WHAT IS THE LEADERSHIP EDGE?

Too often we use old behaviour with new technology. A forward thinking leader uses new processes as well as new technology. Facilitation and technology make a fine working partnership.

WHAT IS IT?

A passionate alternative to the potential overuse of PowerPoint.

WHY SHOULD I USE IT?

Use *storytelling* as the core of a presentation to break from the 'canned presentation' approach and to add vision and spirit to your communication efforts.

HOW CAN THIS TOOL HELP?

Audio-visual aids started out as tools to help make complex points simpler, e.g., charts, graphs, and other learning assist shortcuts. But text projected on a wall can be as boring as watching paint dry. Instead of putting the speaker into a presentation, the 'deck' approach allows us to hand off the work to others (someone with PowerPoint skills). Heart, passion, motivation and energy yield to software. The challenge is to put text back where it belongs: in oratory, where it has a chance of reaching listeners.

HOW DOES IT WORK?

Planning, Doing and Following up

- Resolve that from now on, no presentation of yours will be totally electronic.
- With every subsequent presentation, lower the content of audio-visual aids.
- Learn to challenge your presentation style and design all the time.

"The truth is more important than facts."

Frank Lloyd Wright

- Don't be afraid to make speaking errors. Most people do not expect or enjoy perfection.
- Trust yourself and be true to yourself and your stories.
- Seek continuing critiques from audience and peers.
- Enrol in a storytelling course and archive your best stories.
- Borrow stories from classical and contemporary sources to adapt and use.
- Build on your strengths and practise to improve in areas of weakness.

What resources do I need?

Mentors, teachers, good books and learning groups such as Toastmasters.

What is the leadership edge?

People will start to listen to you, your ideas and your organization's mission. A big plus: you will also begin to enjoy this part of your work.

The Accountability Agreement

What is it?

It is a statement of personal promise and obligation between individuals in an organization designed to acknowledge and deliver defined results.

Why should I use it?

You use it to create an environment where all people do have the opportunity to do their best, deliver results and realize consequences.

How can this tool help?

It moves people from activity to results, it focuses the personal and organization goals on business arrangements and it pulls together individual accountability with organizational accountability.

How does it work?

One model of accountability stresses seven elements. They include:

- A Business Focus Statement that describes the business you are in including products and services.
- Operational Accountabilities describe the range of outcomes necessary for success in your business focus. They are not activities.
- Leadership accountabilities include those outcomes more related to the people you work with and for. They are more relationship and workplace culture based.

"Do not want for leaders, do it alone, person to person."

Mother Teresa

- Support requirements are negotiated and put into the *Accountability Agreement*. To achieve success I will need...
- Goals are measurable and time based.
- Consequences are those positive rewards and recognition for success. Punishment or negative consequences are not part of an *Accountability Agreement*.
- Renewal. *Accountability Agreements*, in order to be effective and part of the long-term culture must be renewed annually.

What resources do I need?

Use the flip chart. One side states what you do...the other what are your results. A good time to do *Accountability Agreements* would be at the same time you are doing *Team Charter* work.

What is the leadership edge?

Because every employee does an agreement, it becomes the best opportunity for alignment in the organization. They take the assumptions and make them real around promises, expectations, results and consequences.

Dialogue

WHAT IS IT?

Dialogue is a process that facilitates group conversation from a basis of shared inquiry. The term "dialogue" flows from Greek and signifies a "flow of meaning." The essence of *dialogue* is a process of inquiry that brings new ideas, perceptions, and understanding to the surface.

Four core practices essential to *dialogue* are:

- Cultivating your authentic voice;
- Listening deeply;
- Developing extraordinary respect for yourself and others; and
- Suspending your certainties and assumptions.

Dialogue is often referred to as the art of reflecting and thinking together.

WHY SHOULD I USE IT?

Dialogue is ideally suited for seeking insights into an issue or situation that has remained elusive. A space is created where trust is built allowing us to suspend and question assumptions and judgements. This often allows participants to name “unmentionables” in a safe and respectful manner that provides clarity and deeper understanding. This can lead to shared meaning and the potential for innovation and creativity.

HOW CAN THIS TOOL HELP?

Dialogue is a process which allows for deep inquiry. Given this, it is suited for conversations

"SUPPOSE WE WERE ABLE TO SHARE MEANINGS FREELY WITHOUT A COMPULSIVE URGE TO IMPOSE OUR VIEW OR TO CONFORM TO THOSE OF OTHERS AND WITHOUT DISTORTION AND SELF-DECEPTION. WOULD THIS NOT CONSTITUTE A REAL REVOLUTION IN CULTURE?"

DAVID BOHM, CHANGING CONSCIOUSNESS 1992

that require looking at complex and perhaps value laden issues. It is not suited in situations when immediate solutions are required or actions need to be taken.

How does it work?

When a *dialogue* is convened, it is usually moderated, either by a member of the team or a third party. Participants sit in a closed circle of chairs. It is recommended that this be done without tables. It is believed that the spatial environment will have an impact on the quality of the conversation. All participants are asked to commit to embodying the four core practices of *dialogue*. There is no set agenda (other than perhaps time constraints). The issue for *dialogue* is known to all participants and a free flowing conversation is encouraged. There is no intended outcome, however, insights frequently emerge on their own.

What resources do I need?

Participants, a moderator (trained or experienced in *dialogue* moderation), a meeting room (preferably without tables)

What is the leadership edge?

Through *dialogue*, conditions are created that lead to honesty, deep listening and inquiry. These conditions lend themselves to creativity and innovation.

Interest-based Negotiations

What is it?

The key elements of *Interest-based Negotiations* are as follows:

- Know your BATNA (best alternative to a negotiated agreement);
- Focus on interests, not position;
- Invent options for mutual gains;
- Insist on objective criteria as a benchmark for resolution; and
- Separate the people from the problem.

Why should I use it?

The *Interest-based Negotiations* model has been proven to assist in reaching agreements that ensure long-term commitments have been reached efficiently, and maintains working relationships.

How can this tool help?

Interest-based Negotiations focuses on the power of partnerships, dialogue, and maintaining and creating strategic alliances. It creates an environment of idea generation, mutual gain, and trust.

How does this work?

It remains crucial to the process that, prior to entering into the process, the parties have some degree of mutual trust. Assuming that this exists, the parties would enter the research phase where

"I've worked all my life and with all kinds of people.

Come with me and I'll work with you too."

Willy George

each party would analyze and understand each other's interests, fears, and concerns prior to sitting down at the negotiation table. Secondly, the parties would enter into the dialogue phase that focuses on the creation of options and value to resolve the issues to be negotiated. Finally, the parties would then discuss the distribution of value through the tabling of offers.

What resources do I need?

All the players, a meeting room, and possibly a facilitator.

What is the leadership edge?

Interest-based Negotiation creates and maintains an atmosphere of dialogue building, brainstorming, and the creation of mutual gains. Furthermore, this approach facilities the creation of strategic partnership opportunities, clear communications, and mutual trust.

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On-line resources

Shaping a Public Service Learning Organization: From Coast to Coast to Coast
www.ccmd-ccg.gc.ca/learning tour/index.html

The Learning Coach
www.ccmd-ccg.gc.ca/learning-coach/webs/public/welcome.asp

The Leadership Network
www.leadership.gc.ca

Coaching Connection
(at The Leadership Network website)
www.leadership.gc.ca/coaching

The Learning Resource Network
www.learnet.gc.ca

http://www.managers-gestionnaires.gc.ca