

2009 CALCASA LEADERSHIP CONFERENCE

TRACK 5 – MANAGEMENT/LEADERSHIP
Non-profit Mission, Management, and Leadership in Turbulent Times

Participant Workbook

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AGENDA

Introductions

Program Overview

Ground Rules

Team Building - Getting More From Less

BREAK (10:30 am – 10:45 am)

Management - Non-Profit vs. For-Profit Leadership

LUNCH BREAK (11:45am – 1:15 pm)

Leadership Skills for Managers

BREAK (3:00 pm – 3:15 pm)

Action Planning - Create an Action Plan

In Closing

References

Appendix

PROGRAM OVERVIEW

Non-profit Mission, Management, and Leadership in Turbulent Times

In these turbulent times, non-profit organizations are laboring under increased challenges in funding, services delivery, finding and retaining staff and volunteers, and dealing effectively with stakeholder groups (e.g. Boards of Directors and services recipients). This experiential workshop will help non-profit senior and aspiring leaders enhance their leadership skills, understand the best practices and current trends from corporation management and provide tools and techniques to help these leaders adapt the strategies identified to more effectively meet current leadership challenges.

Participants in the Workshop will benefit from new insights and skills in the following areas:

- Best practices in for-profit leadership applied to non-profits
- Reflect on and share their own perspectives on specific leadership practices currently used in their Centers
- Coaching, collaboration, and team building skills as leadership competencies
- Collaborate in small workgroup exercises in team-building and strategy development
- Develop a plan for collaboration and support within the CALCASA stakeholders network

INTRODUCTIONS

Introduce yourself

- Name
- Organization
- Position
- Brief background (1 minute)
- What is your most challenging issue now?

GROUND RULES

What needs to happen to make this wonderful for all of us?

- No personal attacks
- No wrong answers
- Respect for one another
- Parking Lot
- What else?

TEAM BUILDING - GETTING MORE FROM LESS

The goals of this workshop are two-fold. The first is to introduce concepts that can help each of you enhance your leadership effectiveness – management, leadership, team skills, and improving your organizations’ overall effectiveness. The second is to encourage you to begin to view each other as resources. Times are tough, particularly for non-profit organizations. You, as the leaders of the Rape Crisis Centers, are all in this together. Your mission and purpose are the same regardless of whether your Center is in an urban or rural setting. Collectively, you have more wisdom than you might think. YOU know how to operate in this environment. Let’s share the wisdom. Sharing information can be beneficial to each of you (e.g. knowledge, lessons learned, workarounds, and tips for handling challenging situations).

EXERCISE: Let the sharing begin. At your table, spend about 30 minutes doing just that – sharing information about your centers and how you are dealing with the challenges you are currently facing. Issues can include, but are not limited to:

1. Process/procedures for turbulent times
2. Staff rewards when you can’t give money

Select a scribe and a spokesperson to capture the key points so that we can share insights in the larger group at the end of the exercise. (30 minutes)

The exercise we just completed is an example of working as a team. The participants in this room form a team – TEAM CALCASA. You all face similar issues and challenges. You are resources for one another. You can share wisdom, ideas, and solutions that have worked for you. Similarly, there is wisdom to be tapped at each of your Centers.

In the Appendix, I have provided a number of resources to support you. For team development, see: The Top 10 High Impact Team Practices.

MANAGEMENT - NON-PROFIT VS. FOR-PROFIT LEADERSHIP

What’s the difference between a for-profit and a non-profit organization? That is the question we will explore in this section. The key difference is that for-profit business is focused on profit and the non-profit business is focused on the mission. However, to remain viable, both types of organizations need to fund their operations, develop their leaders, market their goods and services, etc.

Group Exercise: What processes do you feel are unique to For-Profits?
What processes do you feel are unique to Non-Profits?
Which For-Profit processes are transferable to Non-Profits (or vice versa)?

For Profit	Non-Profit

LEADERSHIP SKILLS FOR MANAGERS

A comprehensive list of Leadership Competencies and skills for managers is provided as a reference in the Appendix. A quick glance at the list makes it clear that there is not enough time in this short workshop to tackle the subject of leadership competencies. However, current best practices in leadership emphasize three types of skills that cut across many of the competencies: team building, communication, and coaching. Our first exercise emphasized team involvement. Now let's consider communication and coaching skills.

Communication Skills

M.E.E.T. Model

M – Make time to discuss

E – Explore differences

E – Encourage respect

T – Take Responsibility

Make time to discuss	Explore the Differences
<ul style="list-style-type: none">• There's something I'd like to discuss• Do you have a minute?• Can we talk about something?• Can we talk for a few minutes in private?• Does this time work for you?	<ul style="list-style-type: none">• This is important because ...• The way I look at this is ...• What's your perspective?• It could be ...

Encourage Respect	Take Responsibility
<ul style="list-style-type: none">• I see your side ...• I've had a similar experience ...• I really appreciate the way you ...• This is important to both of us ...	<ul style="list-style-type: none">• How about we agree to ...• Can you ...?• I'll will ...• Let's try this for a couple of weeks and see ...

Coaching Skills - Overview of Coaching Skills For Leaders

Category	Coaching Skill
<ul style="list-style-type: none"> • ENGAGE <p><i>Show that you are fully engaged</i></p>	<ul style="list-style-type: none"> - Listen - Receive Feedback - Provide Effective Feedback
<ul style="list-style-type: none"> • TEAM <p>Show that you are working as a team</p>	<ul style="list-style-type: none"> - Explore - Partner
<ul style="list-style-type: none"> • CONNECT <p>Show that you care</p>	<ul style="list-style-type: none"> - Develop Rapport - Demonstrate Empathy
<ul style="list-style-type: none"> • ENCOURAGE <p>Show that you encourage</p>	<ul style="list-style-type: none"> - Inspire Action
<ul style="list-style-type: none"> • ENHANCE INSIGHT <p>Show that you have personal insight</p>	<ul style="list-style-type: none"> - Develop Self-awareness - Develop Self-management

Exercise: Listening

Using the Listening & Reflecting Techniques on the next page, break into pairs.

Part 1: Person one: talk to your partner about your last vacation.

Person two: Ignore partner. Then switch. Debrief – how did it feel to be ignored. (5 minutes)

Part2: Person one: talk about any subject you find interesting. Person 2: listen intently (use techniques from next page). Then switch. Debrief – how did it feel to be listened to? (5 minutes)

Listening & Reflecting Techniques

Active Listening Hints

- Concentrate your physical and mental energies on listening.
- Demonstrate interest and alertness.
- Suspend judgment; listen with an open mind.
- Keep emotional responses under control.
- Avoid interrupting.
- Use questions sparingly.
- Be patient.

Paraphrasing

1. A restatement of what the speaker expressed – as understood by the listener, and stated in the listener’s words – to simplify or more easily comprehend.
2. Allows the listener to ascertain whether the speaker conveyed the meaning that he/she intended.
 - “So, your view is that ... [].”
 - “What I’m hearing is that Friday’s test data has invalidated our assumptions.”
 - “You started the project as the team lead and then ... [].”

Clarifying

1. Question or request for further information intended to remove ambiguity from the conversation.
2. Offered without evaluation.
 - “So, do I understand that the customer is asking...[]”
 - “I get the impression this was not the first time it happened?”
 - “Please give me an example of what you mean by...[].”

Summarizing

1. Used at end of a meeting or conversation to identify key points, actions or ideas discussed.
2. Helps to check understanding and accuracy.
 - “Let me take a moment to summarize our conversation.”
 - “So what I’m taking away from this meeting is...[]”
 - “How would you summarize our discussion today?”

ACTION PLANNING

What can you do when you return to your center to make things better, even in a down economy? Using all the data gathered during the prior sections, in your groups, develop an action plan. In your table group, develop an action plan. Select a scribe and a spokesperson. At the end of the exercise, each table group will report out to the larger group.

ACTION PLAN				
Task/Action What will be done?	Responsible Party Who will do it?	Resources Needed Dept/People/Materials	Completion date By When	Status

IN CLOSING

What will you do differently as a result of what you have learned here?

ABOUT JOVITA JENKINS

With a unique background of 3 decades in the aerospace industry, progressing from engineer to executive, educator, consultant, executive coach, and author, Jovita Jenkins, leverages her experience to help professionals and executives enhance their leadership effectiveness. Since retiring from her aerospace career, Jovita concentrates her coaching, speaking, and writing efforts on inspiring business leaders, entrepreneurs, and professionals to think differently about their challenges, overcome roadblocks to their success, and achieve superior personal and professional results. The author of the highly acclaimed book, *Get Out Of Your Own Way – Create The Next Chapter Of Your Life*, Jovita holds BS and MS degrees in Math, an MBA from UCLA's prestigious Anderson School of Business, and is certified as a professional coach through the International Coach Federation.

	<p>Jovita Jenkins, MBA Author • Executive Coach • Speaker</p>	<p>GET OUT of your OWN WAY!</p> <p>Create The Next Chapter of Your Life</p> <p>JOVITA JENKINS</p>
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APPENDIX

The Top 10 High Impact Team Practices

Taken from: *Leading High Impact Teams* by Cynder Niemela and Rachael Lewis

Practice	Description
1. Shared Mission/Purpose and Vision	If you asked each team member what they're working towards, the answer would be the same and it's reflected in their actions.
2. Shared Leadership	Each person takes responsibility for the team's success. Leadership is shared.
3. Defined goals and measurable outcomes.	Goals and objectives are agreed upon by the team and performance is tracked. There are regular evaluations.
4. Clear Roles and Responsibilities	Members are individually accountable for their activities and collectively responsible for achieving the goals.
5. Active support	Resources to be successful are provided: information, money, time, space and talent.
6. Effective Team Process	There are practices in place to ensure Effective Meetings, Integrating New Team Members, Decision Making, and Problem Solving. Members are competent in giving and receiving constructive feedback and coaching.
7. Enhanced Team Competency	Team acknowledges conflict and deals with it when it arises. There is flexibility to integrate change and the ability to adapt to changing conditions.
8. Synergistic Collaboration and Innovation	Trust, accountability and integrity are fostered in team relationships.

	Communication is active. An environment is created that contributes to innovation and problem solving.
9. Meaningful Recognition and Rewards	Individual and team achievements and personal development are recognized.
10. Quality relationships.	Developing and maintaining relationships are critical factors in achieving high impact.

Leadership Competencies

	Leadership Competency	Skill(s)
	BUILDS CREDIBILITY	
1	Acts Ethically	Listening, receiving feedback, providing effective feedback, developing self-awareness, developing self-management
2	Knows When To Challenge	Exploring, inspiring action, providing effective feedback
3	Meets Commitments	Collaborative problem solving, partnering, inspiring action, developing self-management
4	Communicates Openly And Honestly	Listening, receiving feedback, providing effective feedback
5	Presents Clearly And Convincingly	Developing self-awareness, providing effective feedback, developing self-management
6	Displays Confidence And Courage	Developing self-awareness, developing self-management
	LEADS PEOPLE	
7	Empowers And Motivates Others	Listening, receiving feedback, providing effective feedback, partnering, inspiring action, demonstrating empathy
8	Builds Teams And Relationships	Partnering, developing rapport, demonstrating empathy, exploring
9	Attracts And Develops Talent	Developing rapport, partnering, providing effective feedback, demonstrating empathy
10	Fosters Diversity And Inclusion	Listening, receiving feedback, partnering, developing rapport, demonstrating empathy
11	Treats People With Respect	Listening, receiving feedback, providing effective feedback, partnering, developing rapport, demonstrating empathy, providing effective feedback, developing self-management
12	Creates Challenging/Enjoyable Work	Partnering, exploring, facilitating, inspiring action, providing effective feedback, developing rapport

Leadership Competencies (Cont.)

	Leadership Competency	Skill(s)
	DRIVES PROCESS IMPROVEMENT	
13	Collaborates Effectively	Partnering, developing rapport, demonstrating empathy, inspiring action, developing self-awareness, providing effective feedback, listening, receiving feedback, developing self-awareness, developing self-management
14	Solves Problems And Makes Decisions	Developing self awareness, providing effective feedback, developing self-management
15	Builds Problem-Solving Skills In Others	Partnering, providing effective feedback, inspiring action, exploring
16	Champions Change And Innovation	Developing self-awareness, inspiring action
17	Acts With Speed And Urgency	Inspiring action
18	Quality And Continuous Improvement	Developing self-awareness, providing effective feedback
	EXECUTES STRATEGY AND RESULTS	
19	Vision And Strategy	Inspiring to action, developing self-awareness, developing self-management
20	Delivers Superior Financial Results	N/a
21	Respects Customers, Suppliers, And Competitors	Listening, receiving feedback, partnering, developing rapport, demonstrating empathy, providing effective feedback
22	Is A Thought Leader	Developing self-awareness, providing effective feedback
23	Demonstrates Strong Work Ethic	Listening, receiving feedback, developing self-awareness
24	Achieves Work And Life Balance	Developing self-awareness, demonstrating empathy, developing self-management