



INNOVATIVE LEADERSHIP WORKBOOK FOR NONPROFIT EXECUTIVES

Field-Tested Processes and Worksheets for Innovating Leadership,
Creating Sustainability, and Transforming Organizations

MAUREEN METCALF  DANI A. ROBBINS

Praise for the Innovative Leadership Workbook for Nonprofit Executives

As someone charged with the stewardship of a social benefit organization, the challenge is always there to find tools to help navigate what sometimes are obscure paths to create change. We find ourselves adrift without a comprehensible map to guide us. The workbook is an insightful tool that serves not only as a compass, but as a catalyst to embrace self-development as a lifetime process and leadership as lifelong learning.

Elisa Sabatini, Executive Director, Via International



The *Innovative Leadership Workbook for Nonprofit Executives* lays out a process for transformation, and includes a discussion of organizational culture, an exploration of and tools for improving personal and professional leadership style, and an in-depth description of the role of the nonprofit CEO. This is a must-read for senior leadership staff and the boards they serve.

John Hrusovsky, Partner QSI, former CEO, GroundWork group



The development process and tools laid out in the *Innovative Leadership Workbook for Nonprofit Executives* provide a clear direction for nonprofit leaders to strengthen and increase their skills. Particularly during times of funding cuts—but increased needs—our leaders need to invest in their own skills to ensure they can optimally deliver for their agencies.

Sidney R. Hargro, Executive Director, Community Foundation of South Jersey



The *Innovative Leadership Workbook for Nonprofit Executives* offers an honest development journey of a leader in a community-based nonprofit. Her insightful story provides an example of how an individual—sharing power with colleagues and stakeholders as part of an organization—can change a community. Use this workbook to supercharge the impact you make by continuing to develop your leadership skills.

Philip Cass, Ph.D., Chief Executive Officer, Columbus Medical Association and Affiliates



The *Innovative Leadership Workbook for Nonprofit Executives* provides valuable insight and information for nonprofit executives. The case study offers a beautiful example of the personal development journey of an experienced nonprofit executive. The workbook is a must have for your personal development and for that of your team. Skillfully written and well designed, the workbook leads readers on a path toward personal and professional growth and increased effectiveness.

Paul Pyrz, President, LeaderShape



I know the *Innovative Leadership Workbook for Nonprofit Executives* will become a favorite tool for nonprofit thought and action leaders for its practical, no-nonsense and comprehensive approach to building effective and compassionate leadership skills and attitudes during this period when nonprofit outcomes and results are more important than ever for our communities.

Robert A. Kulinski, President, United Way of Summit County

Holding the reins of a community-based nonprofit is a challenge in the best of times and much more difficult in challenging times. The *Innovative Leadership Workbook for Nonprofit Executives* offers steps for improving your own leadership style and transforming your organization. The “fly on the wall” access as one CEO figures out her path forward reminds us that we are not alone. Buy it, implement its wisdom, and get ready to soar!

Natasha Spears, Executive Director, Boys & Girls Club of Dayton



There are compelling reasons for re-evaluating our notions about leadership and innovation. The landscape for leadership has changed. The stakes are higher and the demands for innovation never have been so great to solve our most pressing problems. The *Innovative Leadership Workbook for Nonprofit Executives* is a response to these realities. It provides the opportunity and an open invitation to take a good look at yourself as a leader through an exploration of six stages of leadership development that are essential for new levels of effectiveness, contribution, and results. What I like most about the book is its thoughtful, practical, step-by-step approach to re-evaluating and reinventing how you lead. It is one of those books that become a ready-reference for your personal ongoing leadership journey of renewal and growth.

Debbe Kennedy, Founder, President and CEO, Global Dialogue Center and Leadership Solutions Companies, Author of Putting Our Differences to Work: The Fastest Way to Innovation, Leadership, and High Performance



The seismic shifts in both the economy and the nonprofit sector over the last decade require all leaders to reassess how they lead and manage towards accomplishment of mission. Robbins and Metcalf have taken both their successful and not-so-successful experiences, and used them as valuable teaching tools for the rest of us. The *Innovative Leadership Workbook for Nonprofit Executives* is a guide that each board member and leadership staff should go through as part of leadership development. It forces each leader to create a compelling vision that motivates real change, and gives them the tools and processes to realize that change.

John R. Miller, Regional Vice President, Boys & Girls Clubs of America



Authors Metcalf and Robbins draw upon their own experiences and research to cast a fresh, insightful eye upon what it takes to innovatively lead a nonprofit organization in a quickly changing world. This is a must-have manual for any nonprofit leader, board member, or individual aspiring to become an organizational leader. Metcalf and Robbins write in a lively style, pose lots of compelling questions, and offer plenty of practical examples to illustrate their points. Readers will find the module-style of this workbook to be enormously useful—boards can use modules independently to enhance strategic planning sessions, while leaders can work sequentially through the modules to maximize personal growth. Metcalf and Robbins not only force us to ask important and difficult questions of our own leadership styles, but challenge us to create a dramatically more productive future for our organizations.

Megan Kilgore, Founder and Board President, Ohio Women in Public Finance

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INNOVATIVE LEADERSHIP

Leadership and innovation are two of the most compelling topics in business today. Yet despite the volume of resources exploring both topics, most approaches provide directional solutions that are merely anecdotal and lack sufficient information to actually allow leaders to make measurable change. We know that leadership plays a critical role in an organization's long-term success, and that innovation has become a strategic necessity in today's business environment. In short, both leadership and innovation have a greater impact today than ever before. Technology and increased access to information continue to accentuate their roles, yet organizations are often too overrun with change to handle the torrent of emerging demands.

Still, ensuing questions on how to lead and where to innovate remain puzzlingly philosophical: What is the role of leadership in a time of looming uncertainty? How will organizations innovate to overcome challenges that are largely unprecedented? In a new climate of business, what is the formula for creating success in both areas?

This workbook is designed to help answer those questions and help you to perform the critical self-evaluation needed to refine and innovate your own leadership skills. It is fundamentally about leadership, yet equally an account of applying innovation. Leadership needs innovation the way innovation demands leadership, and by marrying the two, you can improve your capacity for growth and improved effectiveness.

This workbook explores a number of approaches to elaborate on both areas, not just conceptually, but tangibly, by providing exercises designed to enhance your leadership skills. Most importantly, any meaningful advancement concerning both must originate from you. In other words, becoming a better leader and optimizing innovation jointly hinge on your ability to authentically examine your own inner makeup, which will allow you to make real change.

At the same time, you must diligently address some challenging limitations. Despite their collective value, many conventional applications of leadership and innovation have often proven elusive and even problematic in real-world scenarios. For example, if the leadership team of a struggling organization drives initiatives that focus solely on making innovative changes to incentives, products, and services, without also advancing strategic purpose, culture, and team cohesiveness, they will ultimately miss the greater potential to create a meaningful turn-around in the organization. Productivity and system improvements are undoubtedly critical, but how employees make sense of their work experience is equally vital to team engagement and commitment. Innovating products and improving functionality—without also creating a better team environment or a more supportive organizational culture—often appears to pay off in the short term, yet produces lopsided decision-making and shortsighted leadership that have lasting adverse consequences.

Knowing that the future of organizations is irrevocably tied to a world of erratic change, we can no longer afford to improve our systems and offerings without equally advancing our leadership capacity. Leadership empathy and the ability to inspire cultural alignment, along with other

important leadership activities, will make a significant impact on your organization and must be implemented as shrewdly as strategic planning.

Combining leadership with innovation, then, requires you to transform the way you perceive yourself, others, and your business. By vigorously looking into your own experience, including motivations, inclinations, interpersonal skills, and proficiencies, you can optimize your effectiveness in the current dynamic environment. Through deep examination and reflection, you learn to balance the hard skills you have acquired with meaningful introspection, all the while setting the stage for further growth. In essence, you discover how to strategically and tactically innovate leadership the same way you innovate in other aspects of your business.

Marrying Innovation and Leadership

Let's explore innovating leadership in a more tangible way by defining it in practical terms. This, of course, begs the obvious question: *what does innovating leadership really mean?*

It is important to first understand each topic beyond its more conventional meaning. For example, most definitions of leadership alone are almost exclusively fashioned around emulating certain kinds of behaviors: leader X did "this" to achieve success, and leader Y did "that" to enhance organizational performance.

Even if initially useful, such approaches are still, essentially, formulas for *imitating leadership*, and are therefore likely ineffectual over the long term. Innovating leadership cannot be applied as a monolithic theory, or as simple prescriptive guidance. It must take place through your own intelligence and stem from your own unique sensibilities.

In order to enhance this unique awareness process you will need a greater foundational basis from which to explore both topics, which means talking about them in a different context entirely.

Let's start by straightforwardly defining leadership:

Leadership is a process of influencing people strategically and tactically, affecting change in intentions, actions, culture, and systems.

Within this context, and above all else, leadership involves a ***process of influence***: strategic influence to inspire vision and direction; tactical influence to guide functional execution.

Leadership influences individual intentions and cultural norms by inspiring purpose and alignment. It equally influences an individual's actions and organizational efficiencies through tactical decisions.

Innovation, as an extension of leadership, refers to the novel ways in which we advance that influence personally, behaviorally, culturally, and systematically throughout the organization.

Innovation is a novel advancement that influences organizations: personally, behaviorally, culturally, and systematically.

Notice here that in addition to linking the relationship of leadership to innovation, we're also relating to them as an essential part of our individual experience. Just as with leadership and innovation, the way you uniquely experience and influence the world is defined through a mutual interplay of personal, behavioral, cultural, and systematic events. These same core dimensions that ground leadership and innovation also provide a context and mirror for *your total experience* in any given moment or on any given occasion.

Optimally then, leadership is influencing through an explicit balancing of those core dimensions. Innovation naturally follows as a creative advancement of this basic alignment. In our experience, leadership and innovation are innately connected and share a deep commonality.

Therefore, marrying leadership with innovation allows you to ground and articulate both in a way that can create a context for dynamic personal development—and dynamic personal development is required to lead innovative transformative change.

Innovating leadership means leaders influence by *equally* engaging their personal intention and action with the organization's culture and systems.

Though we are, in a sense, defining innovative leadership very broadly, we are also making a distinct point. We are saying that the core aspects that comprise your experience—whether intention, action, cultural, or systematic—are inextricably interconnected. If you affect one aspect, you affect them all.

Innovative leadership is based on the recognition that those four dimensions exist simultaneously in all experiences and already influence every interactive experience we have. So if, for example, you implement a strategy to realign an organization's value system over the next five years, you will also affect personal motivations (intentions), behavioral outcomes, and organizational culture. Influencing one aspect—in this case, functional systems—affects the other aspects, since all four dimensions mutually shape that given occasion. To deny the mutual interplay of any one of the four dimensions misses the full picture. You can only innovate leadership by addressing reality in a comprehensive fashion.

Leadership innovation happens naturally and can be accelerated through the use of a structured process involving your own self-exploration, allowing you to authentically enhance your leadership beyond tactical execution.

To summarize, leadership innovation is the process of improving leadership that allows already successful leaders to raise the bar on their performance and the performance of their organizations.

An innovative leader is defined as someone who consistently delivers results using:

- **Strategic leadership** that inspires individual intentions and *goals* and organizational *vision and culture*;
- **Tactical leadership** that influences an individual's *actions* and the organization's *systems and processes*; and,
- **Holistic leadership** that aligns all core dimensions: *individual intention and action, along with organizational culture and systems*.

The Opportunity of Innovative Leadership

The overwhelming focus of today's organizational changes is on system functionality. Though necessary, it is only part of your total picture. Being guided by more strategically inclusive decisions may be the difference between managing failure and creating tangible success. Your leadership must consider a more balanced definition of innovation that comprehensively aligns vision, teams and systems, and integrates enhanced leadership perspective with system efficiency.

This balanced approach to leadership and innovation is transformative for both you and your organization, and can help you to respond more effectively to challenges within and outside the enterprise. Innovating your leadership gives you the means to successfully adapt in ways that allow optimal performance, even within an organizational climate fraught with continual change and complexity. Conceptually, it synthesizes models from developmental, communications, and systems theory, delivering better insight than singular approaches. Innovative leadership gives you the capacity to openly recognize and critically examine aspects of yourself, as well as your organization's culture and systems, in the midst of any circumstance.

Defining What an Innovative Leader Does

What are specific behaviors that differentiate an innovative leader from a traditional leader? In this time of rapid business, social, and ecological change, a successful innovative leader is one who can continually:

- Clarify and effectively articulate vision
- Link that vision to attainable strategic initiatives
- Develop himself and influence the development of other leaders
- Build effective teams by helping colleagues engage their own leadership strengths
- Cultivate alliances and partnerships
- Anticipate and aggressively respond to both challenges and opportunities
- Develop robust and resilient solutions
- Develop and test hypotheses like a scientist
- Measure, learn, and refine on an ongoing basis

To further illustrate some of the qualities of innovative leadership, we offer this comparison between traditional leadership and innovative leadership:

TRADITIONAL LEADERSHIP	INNOVATIVE LEADERSHIP
Leader is guided primarily by desire for personal success and peripherally by organizational success	Leader is humbly guided by a more altruistic vision of success based on both performance and the value of the organization's positive impact
Leadership decision style is "command and control;" leader has all the answers	Leader leverages team for answers as part of the decision-making process
Leader picks a direction in "black/white" manner; tends to dogmatically stay the course	Leader perceives and behaves like a scientist: continually experimenting, measuring, and testing for improvement and exploring new models and approaches
Leader focuses on being technically correct and in charge	Leader is continually learning and developing self and others
Leader manages people to perform by being autocratic and controlling	Leader motivates people to perform through strategic focus, mentoring and coaching, and interpersonal intelligence
Leader tends to the numbers and primarily utilizes quantitative measures that drive those numbers	Leader tends to financial performance, customer satisfaction, employee engagement, community impact, and cultural cohesion

Getting the Most from the Workbook

Before you get started, take a moment to think about why you purchased this workbook. Setting goals and understanding your intentions and expectations about the exercises will help you focus on identifying and driving your desired results.

In order to help clarify, consider the following questions:

- What are the five to seven events and choices that brought you to where you are professionally and personally?
- How did these events and choices contribute to choosing to buy and use this workbook?
- What stands out in the list you have made? Are there any surprises or patterns?
- What do you hope to gain from your investment in leadership development?
- What meaningful impact will it produce in your professional career and personal life?

In addition to your reflection on the above questions, here are some ideas we recommend to help you get the most out of this experience. It is our experience that people who adhere to the following

agreements tend to have a deeper and more enriching overall experience. By participating in this fashion, you will generate a richer evaluation of yourself and most effectively take advantage of what this workbook has to offer.

Take a moment to reflect on the guidelines:

AGREEMENT	RELATED ACTION OR BEHAVIOR
1. Be fully present	Let go of thoughts about other activities while you read. Bring your full attention to the work
2. Take responsibility for your own success	Be 100% responsible for the outcome of your engagement with this material
3. Participate as fully as possible	Complete all the exercises to the best of your abilities. Apply the concepts and skills that work best for you, and modify those that do not
4. Practice good life management	Invest time at scheduled intervals to work on the materials when you are mentally and emotionally at your best
5. Lean into optimal discomfort; take risks without overwhelming yourself	Be candid, open, and direct. Allow yourself to be curious and vulnerable
6. Take the process seriously, and more importantly take yourself lightly. Make this a positive and rewarding experience	Allow yourself balance. Find the lesson and humor in both your successes and mistakes. Most importantly, have fun!

How to Use the Workbook

After this introduction to innovative leadership, each subsequent chapter builds on a series of exercises and reflection questions designed to guide you through the process of developing your own abilities as an innovative leader. We recommend that you use the following sequence to help efficiently process the material:

1. Read Intently

Read through the chapter completely, as we introduce and illustrate an integrated set of concepts for each element in building innovative leadership.

2. Contemplate

Using a set of carefully chosen applications and specifically designed exercises will help you to embody the work and bring the concepts to life. Through a process of dynamic examination and reflection, you will be encouraged to contemplate some significant, real-life implications of change. Many of the exercises can be done on your own; others are designed to be conducted with input from your colleagues.

3. Link Together Your Experience

As you sequentially build your understanding, you will begin noticing habits and conditioned patterns that present you with clear opportunities for growth. Though you may encounter personal resistance along the way, you will also discover new and exciting strengths. As you become more adept at using these ideas, you will find yourself increasingly capable of proactive engagement with the concepts, along with an ability to respond to situations requiring innovative leadership with greater capacity.

Once you have completed the process, you will have created a plan to grow as an innovative leader. Ultimately, implementing that plan will be up to you and your team.

Innovative Leadership Assessment



Following is a short self assessment to help you identify your own innovative leadership scores. It is organized by the five domains of innovative leadership and will give you a general sense of where to focus your efforts to improve your innovative leadership capacity. As you progress through the book, you will find information on the full assessments if you are interested in a more in-depth and thorough analysis of your current capacity.

We encourage you to take this assessment as a way to get a snapshot of where you excel and where you may want to focus your developmental activities and energies.

Score Yourself on Awareness of Leader Type and Self-Management



Think about your level of response to work situations during the past three months:
Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|--|-----------|
| 1. I have taken a leadership type assessment such as the Enneagram, Myers-Briggs Type Indicator or DISC, and used this information about myself to increase my effectiveness. | 1 2 3 4 5 |
| 2. I use the insight from this assessment to understand my type—specifically, I understand my gifts and limitations, and try to leverage my strengths and manage my limitations. | 1 2 3 4 5 |
| 3. I have a reflection practice where I understand, actively monitor and work with my “fixations” (a fixation is a negative thought pattern). | 1 2 3 4 5 |
| 4. I have a clear sense of who I am and what I want to contribute in the world. | 1 2 3 4 5 |
| 5. I manage my emotional reactions to allow me to respond with socially appropriate behavior. | 1 2 3 4 5 |
| 6. I am aware of what causes me stress and actively manage it. | 1 2 3 4 5 |
| 7. I have positive coping strategies. | 1 2 3 4 5 |
| 8. I actively seek ways to feel empowered even when the organization may not. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 24 or less, it’s time to pay attention to your leadership type and self management.
- If your overall score in this category is 25–31, you are in the healthy range, but could still benefit from some focus on your leadership type and self-management.
- If your overall score is 32 or above, Congratulations! You are self-aware and using your leadership type to increase your effectiveness.

Score Yourself on Developmental Perspective Aligned with Innovation



Think about your level of response to work situations during the past three months:
Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|--|-----------|
| 1. I have a sense of life purpose and do work that is generally aligned with that purpose. | 1 2 3 4 5 |
| 2. I am motivated by the impact I make on the world more than on personal notoriety. | 1 2 3 4 5 |
| 3. I try to live my life according to my personal values. | 1 2 3 4 5 |
| 4. I believe that collaboration across groups and organizations is important to accomplish our goals. | 1 2 3 4 5 |
| 5. I believe that getting business results must be balanced with treating people fairly and kindly as well as have an impact on our customers and community. | 1 2 3 4 5 |
| 6. I seek input from others consistently to test my thinking and expand my perspective. | 1 2 3 4 5 |
| 7. I think about the impact of my work on the many elements of our community and beyond. | 1 2 3 4 5 |
| 8. I am open and curious, always trying new things and learning from all of them. | 1 2 3 4 5 |
| 9. I appreciate the value of rules and am willing to question them in a professional manner in service of meeting our goals and improving the service we provide to our customers. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 27 or less, it's time to pay attention to your developmental level including testing your current level and focusing on developing in the area of developmental perspectives.
- If your overall score in this category is 28–35, you are in the healthy range, but could still benefit from some focus on developing in the area of developmental perspectives.
- If your score is 36 or above, Congratulations! Your developmental level appears to be aligned with innovative leadership, yet this assessment is only a subset of a full assessment.

Score Yourself on Resilience



Think about your level of response to work situations during the past three months:
Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|---|------------------|
| 1. I consistently take care of my physical needs such as getting enough sleep and exercise. | 1 2 3 4 5 |
| 2. I have a sense of purpose and get to do activities that contribute to that purpose daily. | 1 2 3 4 5 |
| 3. I have a high degree of self-awareness and manage my thoughts actively. | 1 2 3 4 5 |
| 4. I have a strong support system consisting of a healthy mix of friends, colleagues, and family. | 1 2 3 4 5 |
| 5. I can reframe challenges to find something of value in most situations. | 1 2 3 4 5 |
| 6. I build strong trusting relationships at work. | 1 2 3 4 5 |
| 7. I am aware of my own self-talk and actively manage it. | 1 2 3 4 5 |
| 8. I have a professional development plan that includes gaining skills and acquiring additional perspectives. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 24 or less, it's time to pay attention to your resilience.
- If your overall score in this category is 25–31, you are in the healthy range, but could still benefit from some focus on resilience.
- If your score is 32 or above, Congratulations! You are likely performing well in the area of resilience, yet this assessment is only a subset of the full resilience assessment.

Score Yourself on Managing Alignment of Self and Organization



Think about your level of response to work situations during the past three months:
Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|---|-----------|
| 1. I am aware of my own passions and values. | 1 2 3 4 5 |
| 2. My behavior consistently reflects my goals and values. | 1 2 3 4 5 |
| 3. I feel safe pushing back when I am asked to do things that are not aligned with my values. | 1 2 3 4 5 |
| 4. I am aware that my behavior and decisions as a leader have a significant impact on the organization's structure and culture. | 1 2 3 4 5 |
| 5. I am deliberate about aligning the organization's pay and performance systems with the types of behaviors we want to encourage (both results and behaviors). | 1 2 3 4 5 |
| 6. The organization's key measures and systems encourage the right actions aligned with the culture, and discourage actions that will damage the organization or make me uncomfortable. | 1 2 3 4 5 |
| 7. I am aware of how my values align with those of the organization and where we are misaligned; I take steps to encourage changes in the culture such as talking about our values and reinforcing what we say we care about. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 21 or less, it's time to pay attention to your alignment with the organization and also the alignment of culture and systems within the organization that you are able to impact.
- If your overall score in this category is 22–27, you are in the healthy range, but could still benefit from some focus on alignment.
- If your score is 28 or above, Congratulations! You are well-aligned with the organization and the organization's culture and systems are well-aligned.

Score Yourself on Leadership Behaviors



Think about your level of response to work situations during the past three months:
Never (1) Rarely (2) Sometimes (3) Often (4) Almost always (5)

- | | |
|--|------------------|
| 1. I tend to be proactive—I anticipate what is coming next and actively manage it. Depending on role, this may happen primarily in my personal life. | 1 2 3 4 5 |
| 2. I focus on creating results in a way that encourages others to grow and develop while accomplishing their tasks. | 1 2 3 4 5 |
| 3. I think about the impact of my actions on the overall organization rather than just getting the job done. | 1 2 3 4 5 |
| 4. I see how my work contributes to the overall organizational success and deliberately try to improve myself and the organization. | 1 2 3 4 5 |
| 5. I take time to mentor others—even when I am busy. | 1 2 3 4 5 |
| 6. I consider myself a personal learner because of the time I spend reading and trying new ideas and activities. I am curious. | 1 2 3 4 5 |
| 7. I have the courage to speak out in a professional manner when asked to do something I disagree with. | 1 2 3 4 5 |
| 8. I accomplish results by working with and through others in a positive and constructive manner. | 1 2 3 4 5 |

Total Score

- If your overall score in this category is 24 or less, it's time to pay attention to your leadership behaviors and look for ways to develop in alignment with your goals.
- If your overall score in this category is 25–31, you are in the healthy range, but could still benefit from some focus on your leadership behaviors.
- If your score is 32 or above, Congratulations! You are likely performing well in the area of leadership behaviors, but this assessment is only a subset of a full leadership behavior assessment.

CHAPTER 1

Elements of Innovative Leadership

We will start with a discussion of innovative leadership then go into what nonprofit leaders do in chapter two. This chapter provides the general framework for innovating how you lead. Innovative leadership is comprised of the five elements presented and discussed below then these are applied throughout the balance of the book.

Figure 1-1 Five Elements of Innovative Leadership



The five elements of innovative leadership are reflected in Figure 1-1.

What is truly unique in this approach to leadership is the overall comprehensiveness of the model. Theorists have looked at each of these elements separately over many years, and have suggested that mastering one or two of them is typically sufficient for effective leaders. We believe that while that may have been true in a less complex world,

it is no longer the case. As the twenty-first century unfolds, the most effective leaders will need a much more holistic view than at any other time in history. In the following chapter, we will define and describe each individual element of innovative leadership and how they interact.

Leader Type

Part of the challenge in innovating leadership is learning to become more introspective and put that introspective knowledge into practice. Looking inside yourself, examining the make-up of your inner being, enables you to function in a highly grounded way, rather than operating from the innate biases that lead to uninformed or unconscious decision-making.

First and foremost, when thinking about leadership, start by simply considering your disposition, tendencies, inclinations, and ways of thinking and acting. Innovating leadership hinges on understanding the simple manner in which you live in your life. One way to observe this is by examining aspects of your inner being, often called leader type, which reflect the leader's personality type. The Leader Personality Type (referred to going forward as Leader Type) has a critical influence on who you are as a leader. It is an essential foundation of your personal make-up and greatly shapes your leadership effectiveness. The ancient adage of "know thyself," attributed to various Greek philosophers, holds true as a crucial underpinning in leadership performance.

Your ability to use deep introspection relies on your development of a capacity for self-understanding and self-awareness. Both allow you to expand your perspective as well as build a greater understanding of others. These critical traits associated with leader type support a leader's abilities to manage self, communicate effectively with others, and encourage personal learning. You can use your understanding of your leader type (understanding yourself and others) as a powerful tool in effective leadership.

It is important to keep in mind that this particular notion of type is something that is native to your being and generally does not change significantly over the course of your life. This is an essential point: by understanding your type, as well as that of others around you, you can begin to see situations without the bias of your own perceptions. You have a clearer understanding, and can thus make more informed decisions with less speculation. You learn to deeply understand the inner movements of your strengths, weaknesses, and core patterns. Leadership typing tools are helpful in promoting this kind of self-knowledge and pattern recognition.

By learning about these patterns, you can gain perspective on your life and start connecting the dots among your different experiences. Most of us have a concept about how we behave, but that idea is likely clouded and not entirely true. One of the hardest things for most people is to see themselves accurately. How astonishing it is to see through the clouds and recognize yourself clearly.

— Roxanne Howe-Murphy, *Deep Living*

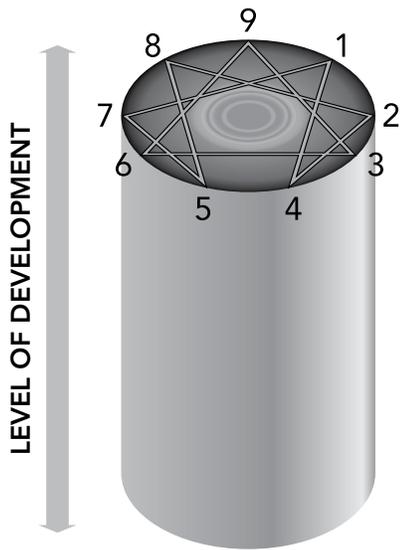
Learning at this deeper level from your own inner dynamics can offer remarkable insight into areas of your life that, in your own personal experience, you may either exaggerate or under emphasize.

Self-awareness and the capacity for self-management are foundational to innovative leadership and overall leadership effectiveness. By becoming aware of your inherent gifts as well as those of others, you are able to improve your personal effectiveness and that of the teams and departments with which you work.

Developmental Perspective

In this workbook we will be talking about *developmental levels and perspectives* as a core element in developing innovative leadership. Developmental perspectives significantly influence how you see your role and function in the workplace, how you interact with other people, and how you solve problems. The term *developmental perspective* can be described as “meaning making” or how you make meaning or sense of experiences. This is important because the algorithm you use to make sense of the world influences your thoughts and actions. Incorporating these perspectives as part of your inner exploration is critical to developing innovative leadership. In his best-selling business book *Good to Great*, author Jim Collins refers to Level 5 Leadership as an example of developmental perspectives applied to leadership. While we do not cover the relationship of Level 5 Leadership to developmental perspectives in this workbook, you can find more information on this subject in the *Innovative Leadership Fieldbook*.

Figure 1-2 Enneagram & Developmental Perspectives

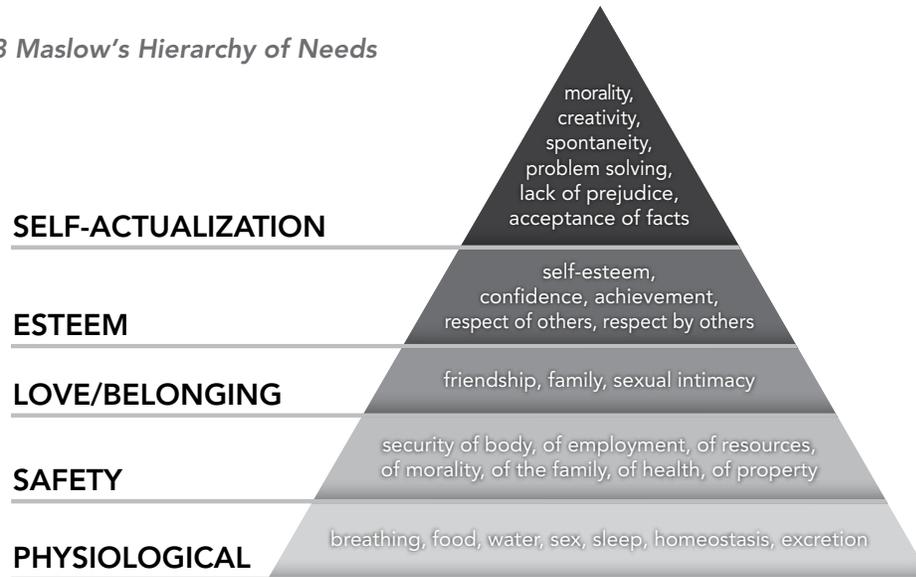


In order to connect developmental perspective with leader type, let's look at how these models come together. While leader type is generally constant over your life, you have the capacity to grow and develop your leadership perspective. In fact, leadership research strongly suggests that although your inherent leader type determines your tendency to lead, good leaders also develop over time. Therefore, it is often the case that leaders are perhaps both born and made. How leaders are made is best described using an approach that considers developmental perspective. Type remains consistent during your life while developmental perspective evolves. This is an important differentiator in leadership effectiveness and allows you to see what can be changed and what should be accepted as innate personality type.

We can also apply this model to the organizational level to help select and train leaders more effectively. Here are some additional benefits of using a model of developmental perspective:

- It guides leaders in determining their personal development goals and action plans using developmental perspectives as an important criteria.
- It is important to consider when determining which individuals and team members best fit specific roles.
- It helps in identifying high-potential leaders to groom for growth opportunities.
- It helps in the hiring process to determine individual fit for a specific job.
- It helps change agents understand the perspective of others and craft solutions that meet the needs of all stakeholders.

Figure 1-3 Maslow's Hierarchy of Needs



The developmental perspective approach is based on research and observation that, over time, people tend to grow and progress through a number of very distinct stages of awareness and ability. One of the most well-known and tested developmental models is Abraham Maslow's Hierarchy of Needs, a pyramid-shaped visual aid Maslow created to help explain his theory of psychological and physical human needs. As you ascend the steps of the pyramid you can eventually reach a level of self-actualization.

Developmental growth occurs much like other capabilities grow in your life. Building on your leader type, you continue to grow, increasing access to or capacity for additional skills. We call this "transcend and include" in that you transcend the prior level/perspective and still maintain the ability to function at that perspective. Let us use the example of learning how to run to illustrate the process of development. You must first learn to stand and walk before you can run. And yet, as you eventually master running, you still effortlessly retain the earlier, foundational skill that allowed you to stand and walk. In other words, you can develop your capacity to build beyond the basic skills you have now by moving through more progressive stages. It is also important to note that while individuals develop the ability to run, there are many times that walking is a much more appropriate choice of movement. The successful leader has a broad repertoire of behavior and is able to select the most appropriate one depending on the situation.

People develop through stages at vastly differing rates, often influenced by significant events or "disorienting dilemmas." Those events or dilemmas provide opportunities to begin experiencing your world from a completely different point-of-view. The nature of those influential events can vary greatly, ranging from positive social occasions like marriage, a new job or the birth of a child to negative experiences, such as job loss, an accident or death of a loved one. These situations may often trigger more lasting changes in your way of thinking and feeling altogether. New developmental perspectives can develop very gradually over time or, in some cases, emerge quite abruptly.

Some developmentally advanced people may be relatively young and yet others may experience very little developmental growth over the course of their life. Adding to the complexity of developmental

growth is the fact that the unfolding of developmental perspectives is not predictably based on age, gender, nationality or affluence. We can sense indicators that help us identify developmental perspective when we listen and exchange ideas with others, employ introspection, and display openness to learning. In fact, most people very naturally intuit and discern what motivates others as well as what causes some of their greatest challenges.

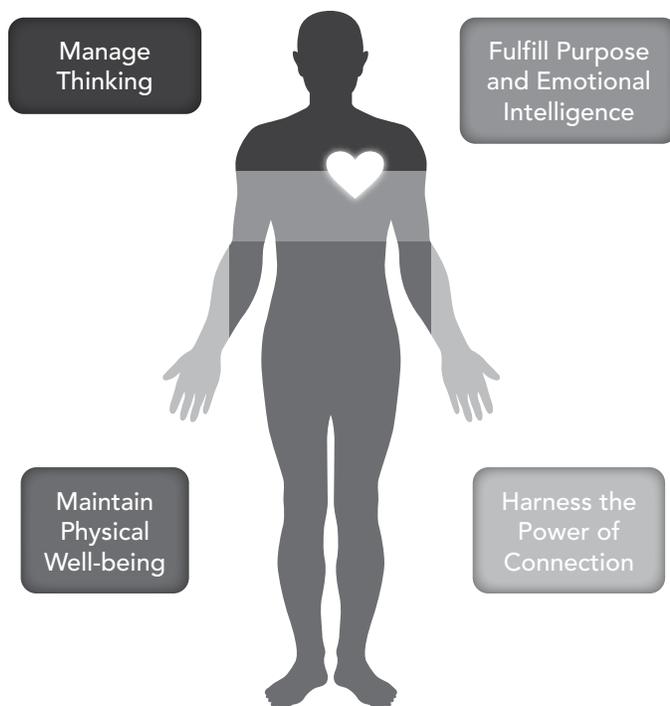
We believe a solid understanding of developmental perspectives is critical to innovating leadership and encourage you to delve into this concept in much greater detail. The purpose of this workbook is to introduce you to the concepts.

Resilience

There are two distinct ways to understand resilience. First, using an engineering analogy, resilience is viewed as how much disturbance your systems can absorb before a breakdown. This view highlights the sturdiness of individual systems. Second, from a leadership perspective, resilience can be viewed as the ability to adapt in the face of erratic change while continuing to be both fluid in approach and driven towards attaining strategic goals. The first definition reflects stability and the second refers to fluidity and endurance. Addressing all aspects of resilience is critical to optimizing it.

Among the elements essential to leadership, resilience is unique in that it integrates the physical and psychological aspects of leader type and developmental perspective to create the foundation of a leader's inner stability. This foundation enables you to demonstrate fluidity and endurance as you adapt to ongoing change.

Figure 1-4 Elements of Resilience



The underlying premise of resilience is: as a leader, you need to be physically and emotionally healthy to do a good job. In addition to physical and emotional health, the resilient leader also has a clear sense of life purpose, strong emotional intelligence, and strong supportive relationships. For most people, enhancing resilience requires a personal change.

Our model has four categories, shown in Figure 1-4. They are: maintain physical well-being, manage thinking, fulfill purpose using emotional intelligence, and harness the power of connection. These categories are interlinked, and all of them must be in balance to create long-term resilience.

Leaders we work with often initially say they are too busy to take care of themselves. Finding the balance between self-care and meeting all of our daily commitments is tough. Most people fall short of their goals and over the longer term make choices for or against their resilience and personal health. Our message here is that creating and maintaining resilience is essential to your success. As you improve your resilience, you will think more clearly and have a greater positive impact in your interactions with others; investing in your resilience supports the entire organization’s effectiveness.

The following table provides questions for each of the four resilience categories to identify opportunities for improvement.

TABLE 1-1 KEYS TO BUILDING & RETAINING PERSONAL RESILIENCE	
<p>Maintain Physical Well-being</p> <p>Are you getting enough:</p> <ul style="list-style-type: none"> ■ Sleep ■ Exercise ■ Healthy Food ■ Time in nature ■ Time to meditate & relax <p>Are you limiting or eliminating:</p> <ul style="list-style-type: none"> ■ Caffeine ■ Nicotine 	<p>Fulfill Life Purpose</p> <p>Understand what you stand for. Maintain focus. Ask:</p> <ul style="list-style-type: none"> ■ What is my purpose? ■ Why is it important to me? ■ What values do I hold that will enable me to accomplish my purpose? ■ What opportunities do I have in my professional life that help me achieve my life purpose?
<p>Manage Thoughts</p> <p>Practice telling yourself:</p> <ul style="list-style-type: none"> ■ Challenges are normal and healthy for any individual or organization ■ My current problem is a doorway to an innovative solution ■ I feel inspired about the opportunity to create new possibilities that did not exist before 	<p>Harness the Power of Connection</p> <p>Practice effective communication:</p> <ul style="list-style-type: none"> ■ Say things simply, and clearly ■ Make communication safe by being responsive ■ Encourage people to ask questions and clarify if they do not understand your message ■ Balance advocacy for your point with inquiring about the other persons’ points ■ When you have a different point of view, seek to understand how and why the other person believes what they do in a non-threatening way ■ When in doubt, share information and emotions ■ Build trust by acting for the greater good

Situational Analysis

Though much of the work of building innovative leadership is based on an in-depth examination of your personal and professional experience, understanding the background or context of that experience is equally important. Consider that your experience isn't merely a collection of personal expressions, events, and random happenstance; rather, it is fundamentally shaped by the background interplay of your individual attributes, shared relationships, and involved organizations.

Every moment of experience is influenced by a mutual interaction of self, culture, action, and systems. All four of these basic dimensions are fundamental to every experience we have. Situational analysis involves evaluating the four-dimensional view of reality shown in Figure 1-5. This comprehensive approach ensures all dimensions are aligned resulting in balanced and efficient action. We refer to these four dimensions as self, action, culture, and systems. This balancing without favoring elements is an important skill for innovative leaders.

Leaders often take a partial approach to changing organizations. They over-emphasize systems change with little or no consideration to the culture or how their personal views and actions shape the content and success of the change. This multi-dimensional approach provides a more complete and accurate view of events and situations. Situational analysis enables you to create alignment across the four dimensions on an ongoing basis.

Figure 1-5- Integral Model



American-born philosopher Ken Wilber developed a conceptual scheme to illustrate the four basic dimensions of being that form the backbone of experience. His Integral Model provides a map that shows the mutual relationship and interconnection among four dimensions where each represents basic elements of human experience.

When you use situational analysis, you are cultivating simultaneous awareness of all four dimensions. Let's look at an example. This is a sample narrative taken from Integral Life Practice (Wilber et al) that will give you a more

experiential description of how these dimensions shape every situation in your life.

Example: "Visualize yourself walking into an office building in the morning..."

Self (Upper-Left Quadrant, "I"): You feel excited and a little nervous about the big meeting today. Thoughts race through your head about how best to prepare.

Culture (Lower-Left Quadrant, "We"): You enter a familiar office culture of shared meaning, values, and expectations that are communicated, explicitly and implicitly, every day.

Action (*Upper-Right, "It"*): Your physical behaviors are obvious: walking, waving good morning, opening a door, sitting down at your desk, turning on the computer, and so on. Brain activity, heart rate, and perspiration all increase as the important meeting draws nearer.

System (*Lower-Right, "Its"*): Elevators, powered by electricity generated miles away, lift you to your floor. You easily navigate the familiar office environment, arrive at your desk, and log on to the organization's intranet to check the latest sales numbers within the organization's several international markets.

In applying situational analysis to an organizational change, you would be aware of the four dimensions as referenced above and, when changing one, you would consider the impact on the others. If you get promoted and want to be perceived differently, how will you behave in the situation above? What will be different in all four dimensions as you walk into the office building?

A crucial part of innovating leadership is developing your capacity to be aware of all dimensions of reality in any given moment and identify misalignments. Even though you cannot physically see the values, beliefs, and emotions that strongly influence the way an individual colleague perceives himself/herself and the world, nor a group's culture, emotional climate or collective perception, they still profoundly shape the vision and potential of leaders to innovate.

Situational Analysis is an innovative leadership tool that allows you not only to make more informed decisions, but also helps you optimize performance within yourself, your teams, and the broader organization. The alignment of all dimensions is the key to optimizing performance.

Leader Behaviors

Let's now shift our focus to the actionable craft of leadership as observable skills and behaviors. In this section, we are talking about observable leadership skills and behaviors and hard skills and their associated behaviors. Leadership skills and hard skills are critical to success, and serve as objective performance measures of innovative leadership.

Hard skills fall into two primary categories: industry-related knowledge, skills, and aptitudes; and functional knowledge, skills, and aptitudes. Leadership skills can be evaluated by observable behaviors and result from knowledge, skills, and aptitudes specifically related to the craft of leadership.

We will be using the term leadership behaviors in this workbook when referring to leadership knowledge, skills, and aptitudes and the resulting behaviors. Both hard skills and leadership behaviors are critical to building innovative leadership; however, the balance between the importance of hard skills and leadership behaviors will shift as the leader progresses in the organization with leadership skills and behaviors becoming increasingly important with career advancement.

Leadership behaviors are important because they are the objective actions the leader takes that impact organizational success. We have all seen brilliant leaders behave in a manner that damages

their organization and we have seen other leaders continually behave in ways that promote ongoing organizational success. Effective leadership behaviors drive organizational success and, conversely, ineffective leadership behaviors drive organizational dysfunction or failure. Even the most functionally brilliant leader must demonstrate effective leadership behaviors to be successful when leading an organization.

An example of the need for both hard skills and leadership behaviors is a hospital CEO client. To be successful, this CEO must possess the hard skills in nonprofit administration to understand how the organization operates and the leadership behaviors to be able to effectively lead. If either of these sets of skills is missing, the leader and the nonprofit are at risk of failure. Early in his career, a mastery of nonprofit administration set him apart from his peers. As he progressed into the senior leadership ranks and ultimately to the role of CEO, his use of leadership behaviors became his primary focus while he never lost the need for hard skills, now he relies on his functional and leadership skills to guide his direction and action.

There are different ways to discuss leadership from a skills perspective as demonstrated by Peter Northouse in his book on leadership.

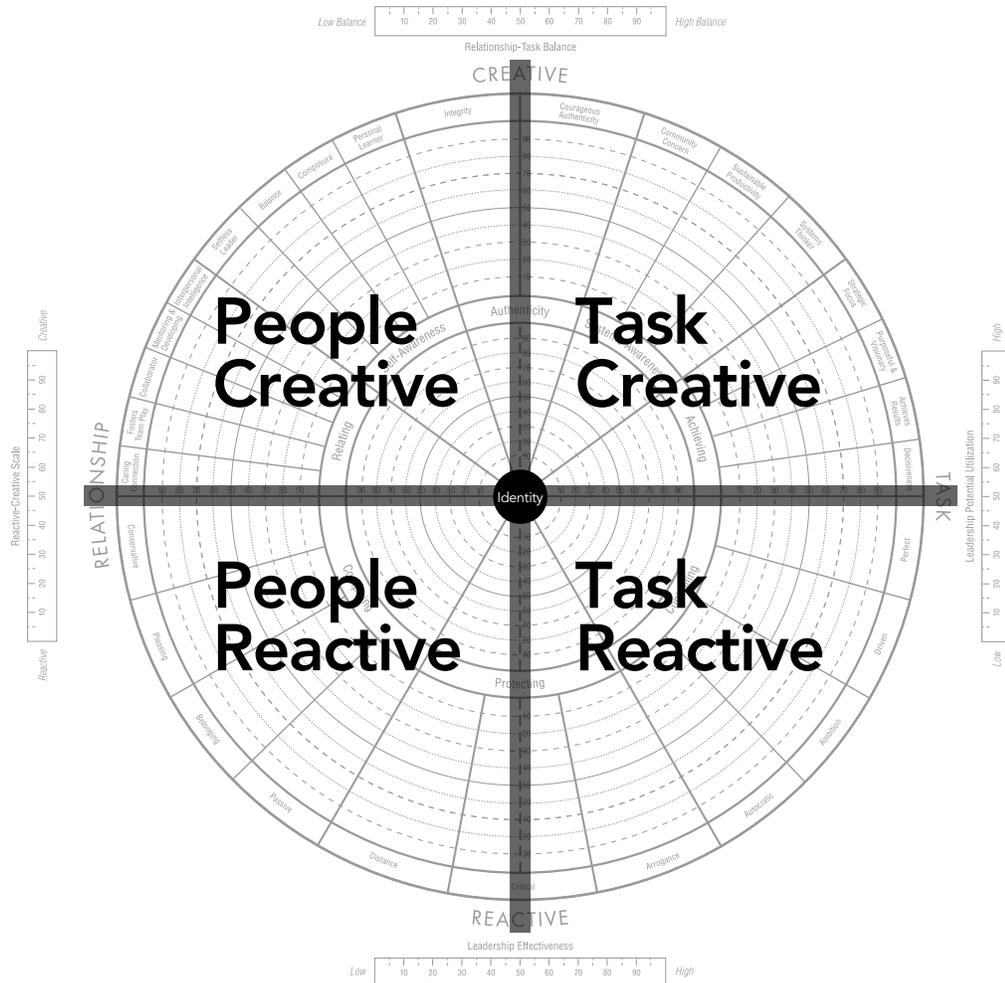
There are several strengths in conceptualizing leadership from a skills [actions] perspective. First, it is a leader-centered model that stresses the importance of the leader's abilities, and it places learning skills at the center of effective leadership performance. Second, the skills approach describes leadership in such a way that it makes it available to everyone. Skills are behaviors that we all can learn to develop and improve. Third, the skills approach provides a sophisticated map that explains how effective leadership performance can be achieved.

— Peter G. Northouse, *Leadership Theory and Practice*

As a leader, it is important to understand the key leadership behaviors important to you and your organization. With this understanding, you can determine where you excel and where you may want to refine your skills.

The Leadership Circle Profile (LCP) Behaviors

Figure 1-6- The Leadership Circle Profile



The Leadership Circle measures key dimensions of leadership shown in the inner circle in Figure 1-6. The sub-categories are shown in the outer circle (for reference go to www.theleadershipcircle.com) and can be broken into four key dimensions: people creative, task creative, people reactive, and task reactive. These four categories are created by drawing a line through the circle horizontally to separate the creative and reactive dimensions. The second line is drawn vertically to separate the people and task dimensions. The top of the circle behaviors are **creative behaviors**:

- Relating
- Self-awareness
- Authenticity
- Systems Awareness
- Achieving

These behaviors reflect proactive action which is referred to by the Leadership Circle as “Creative.” These behaviors reflect behaviors associated with setting strategic direction and inspiring people to accomplish goals.

The behaviors in the bottom half of the circle are **reactive behaviors**. They reflect inner beliefs that limit effectiveness, authentic expression, and empowering leadership. These dimensions reflect behaviors associated with following direction or reacting to circumstances as they arise rather than setting direction and creating the conditions for success.

The creative and reactive dimensions are then split on the vertical axis between people and task behaviors. People behaviors are associated with the actions leaders take to build themselves and their people such as relating and self-awareness. The task behaviors are actions leaders take associated with the work of running a business, such as systems awareness and achieving. The degree of emphasis on task versus relating will vary depending on your level within the organization, the overall organizational structure, and the organizational type. What is important to note is that leadership requires a balance of task-related behaviors along with relationship-related behaviors and this balance changes depending on the situation.

It is important to understand the behaviors associated with innovative leadership and also be able to flex your own leadership behaviors to match what is required by the organization. The most effective leaders and organizations demonstrate behaviors heavily weighted on the creative end of the scale. The balance between task and relationship will depend in part on the role of the leader within the organization. Strong leaders have the capacity to perform both people and task-related roles well.

According to *The Leadership Circle Participant Profile Manual*, 2009 Edition published by The Leadership Circle, “These competencies [behaviors] have been well researched and shown to be the most critical behaviors and skill sets for leaders.” Table 1-2 was adapted from *The Leadership Circle Participant Profile Manual*, 2009 Edition, published by The Leadership Circle.

TABLE 1-2 LCP DIMENSION DEFINITIONS	
Creative leadership behaviors listed below reflect key behaviors and internal assumptions that lead to high fulfillment, high achievement leadership.	
<p>The Relating Dimension measures leader capability to relate to others in a way that brings out the best in people, groups and organizations. It is composed of:</p> <ul style="list-style-type: none"> ■ Caring Connection ■ Fosters Team Play ■ Collaborator ■ Mentoring and Developing ■ Interpersonal Intelligence 	<p>The Self-Awareness Dimension measures the leader’s orientation to ongoing professional and personal development, as well as the degree to which inner self-awareness is expressed through high integrity leadership. It is composed of:</p> <ul style="list-style-type: none"> ■ Selfless Leader ■ Balance ■ Composure ■ Personal Learner

TABLE 5-1 LCP DIMENSION DEFINITIONS (CONT.)

<p>The Authenticity Dimension measures the leader’s capability to relate to others in an authentic, courageous, and high integrity manner. It is composed of:</p> <ul style="list-style-type: none"> ■ Integrity ■ Authenticity 	<p>The Systems Awareness Dimension measures the degree to which the leader’s awareness is focused on whole system improvement and on community welfare (the symbiotic relationship between the long-term welfare of the community and the interests of the organization). It is composed of:</p> <ul style="list-style-type: none"> ■ Community Concern ■ Sustainable Productivity ■ Systems Thinker
<p>The Achieving Dimension measures the extent to which the leader offers visionary, authentic, and high accomplishment leadership. It is composed of:</p> <ul style="list-style-type: none"> ■ Strategic Focus ■ Purposeful and Visionary ■ Achieves Results ■ Decisiveness 	

We will use these creative behaviors throughout the book as we refer to leadership behavior.

Since this book is about becoming an innovative nonprofit leader, chapter two focuses on defining the role of an effective nonprofit CEO in a community based-organization. Performing this role well is the foundation upon which to build innovative leadership. If you find developmental opportunities in this chapter, please make sure you add them to your development plan along with the other areas of innovative leadership development. Additionally, there is an appendix that provides additional details on nonprofit leadership and management for the leader who wants to explore a specific topic in more detail.

Developing Innovative Leadership

Chapters three through seven walk you through the process of developing innovative leadership specifically for nonprofits. Each chapter reflects one step in the development process and includes tools, templates, questions for reflection, and an example of a person who has completed the process. It is the comprehensiveness of this reflection coupled with the exercises that will give you insight into yourself and your organization. This insight is required to change yourself and your organization concurrently or to manage your internal change in the context of an organization that you cannot or do not want to change. It is important to note that leadership development is an ongoing process. Upon completion of this process you will be more effective; yet, depending on your objectives, you may still want to continue developing. Figure 1-7 below shows the six steps.

Figure 1-7 Leadership Development Process



While this process appears linear, we have found that when leaders work through these steps they often return to earlier parts of the process to clarify and sometimes change details they had originally thought were correct. The structure of our process will continue to challenge you to refine the work you have accomplished in prior tasks. First ideas are often good ones, but when you work with this tool you will continually find insight and discover new things. We encourage you to continue to test your ideas and feel comfortable going back in the process for further refinement.

The time you spend working on the workbook is an investment in your development. If you are engaging deeply in the process it will likely take you three to six months or longer to complete. Whether managing either personal and organizational change, or internal change alone in the context of an organization that you cannot or do not want to change, reflection and thorough evaluation are required. This reflection will take time and is critical to your growth. We strongly encourage you to engage in the process with as much time and attention as possible. The value you ultimately take from this process is closely linked to the time you invest.

REFLECTION QUESTIONS

What innovative challenges does your organization face?



How does your organization support effective leadership for innovation?



In what ways would you consider yourself an innovative leader?



How do you personally connect with leadership and innovation?



Where are the opportunities for you to be an innovative leader?



What would make you and your organization more effective in leading innovation beyond products, services, and systems?

CHAPTER 3

Step 1: Create a Compelling Vision of Your Future

The Innovative Leadership workbook is designed to provide a step-by-step process to support you in developing your own innovative leadership capacity. The fieldbook that serves as the foundation for this workbook has been tested with a broad range of clients as well as hundreds of working adults participating in an MBA program.



The comprehensiveness of these exercises coupled with reflection exercises will give you the insight into yourself and your organization needed to make substantive personal change. While this process appears linear, we have found that when leaders work through these steps, they often return to earlier parts of the process to clarify and sometimes refine their answers. The structure of our process will continue to challenge you to refine the work you have completed in prior exercises. First ideas are often good ones, yet when you work with this tool you will continually find insight. We encourage you to continue to test your ideas and feel comfortable circling back for further refinement.

These tools differ from many others by directing you through an exploration that takes into account your unique, individual experience while simultaneously considering the groups and organizations to which you belong.

The first step in starting your development process is cultivating a sense of clarity about your overall vision, which can also be summarized as your direction and aspirations. The intention behind your aspirations fuels both personal and professional goals, as well as a sense of meaning in your life. When your actions are aligned with your goals, they drive the impact you create in the world at large. As you move forward in the visioning process, we will guide you to begin thinking about individuals or groups who inspire or have a significant influence on you.

Simply put your vision and aspirations help you decide where best to invest your time and energy. Clarifying them helps you define a manner of contributing to the world that authentically honors who you are. Your vision and aspirations further help you clarify what you want to accomplish over time. You can select the time span that resonates for you, whether short-term—one to five years—or perhaps a longer-term time horizon, such as the span of your lifetime. After clarifying your own unique, personal vision, you will have the foundation for your ensuing change process. Knowing your vision and values creates the basis for your goals, and can help you align your behavior with your aspirations.

As part of the visioning process, it is important to consider the context of your leadership role, your organization or employer. If you are clear about your personal vision, you can evaluate where and how you fit within that organization. On the other hand, if your vision differs significantly from what you do and how you work, the additional information will guide you in finding a role that is a better fit (this transition may not happen in the short term). By knowing your vision and aspirations, you are equipped with information that helps you align the energy you invest with the work you do.

In addition to creating a well-defined vision, it is also important to be clear about your motivation. The combination of vision and desire is what will enable you to maximize your potential. Without sufficient desire, solid vision, and understanding of your current capabilities, you are likely to struggle when progress becomes difficult.

Tools and Exercises

The exercises will guide you in identifying what is most important to you. First, you will define your future, and from that vantage point, clarify your vision and values. You will then consider what you want to do professionally, as well as the type and extent of the impact you want to have on the world.

It is important to note that many people will participate in this exercise and still not have a clearly articulated vision—this is because defining personal vision requires a great deal of introspection for many people. While some people grow up knowing what they want to do for a living, for others identifying a vision is a process of gradual exploration and will take more time and energy than completing a single workbook exercise. You will likely refine your vision as you progress through later chapters in the workbook based on the information you learn about yourself. Because the visioning process is iterative in nature—a process of self-discovery—the exercises in this book will serve as the foundation for a longer process that may take considerably more time to complete. It will likely change as you gain experience and as your introspective process matures.

Define Personal Vision

Follow the steps defined below:

Step 1: Create a picture of your future. Imagine yourself at the end of your life. You are looking back and imagining what you have done and the results you have created.

- What is the thing you are most proud of?
- Did you have a family?
- What would your family say about you?
- What did you accomplish professionally?
- What would your friends say about you?

For the rest of this exercise, let that future person speak to you and help you set a path that will enable you to look back with pride and say things like, “I feel fulfilled and at peace. I lived my life well.”

Step 2: Write a story. Now that you have that image of what you will accomplish, write a brief story about your successful life. Include details about the questions above. Make it a story of what you went through to accomplish each of the results for the questions you answered. What you are trying to create is a roadmap for your journey that gives you more insight into what you would want if you had the option to design your perfect life.

- Who helped you along the way?
- What did you enjoy about your daily life?
- Who was closest to you?
- What feelings did you have as you accomplished each milestone along the way?
- How did you mentor others and contribute to the success of others?
- What did you do to maintain your health?
- What role did spirituality or religion play in your journey?
- What job did you have?
- What role did material success play in your life?
- What type of person were you (kind, caring, driven, gracious)?

Step 3: Describe your personal vision. Given the story you have written and the qualities you demonstrated, write a two to five sentence life purpose statement—a statement that talks about your highest priorities in life and your inspirations. This statement should capture the essence of how you want to live your life and project yourself.

An example - My vision is to develop myself to my greatest capacity and help others develop and thrive in all aspects of their lives. I will live consciously and courageously, relate to others with love and compassion, and leave this world better for my contribution.

Step 4: Expand and clarify your vision. If you are like most people, the choices you wrote are a mixture of selfless and self-centered elements. People sometimes ask, “Is it all right to want to be covered in jewels, or to own a luxury car?” Part of the purpose of this exercise is to suspend your judgment about what is “worth” desiring, and to ask instead which aspect of these visions is closest to your deepest desire. To find out, ask yourself the following questions about each element before going on to the next one: If I could have it now, would I take it?

Some elements of your vision don’t make it past this question. Others pass the test conditionally: “Yes, I want it, but only if...” Others pass, but are further clarified in the process. As you complete this exercise, refine your vision to reflect any changes you want to make.

After defining and clarifying your vision, it is time to consider your personal values. The combination of these two exercises will help you create the foundation of what you want to accomplish and the core principles that guide your actions as you work toward your vision.

Checklist for Personal Values

Values are deeply held views of what we find worthwhile. They come from many sources: parents, religion, schools, peers, people we admire, and culture. Many go back to childhood; others are taken on as adults. Values help us define how we live our lives and accomplish our purpose.

Step 1: Define what you value most. From the list of values (both work and personal), select the ten that are most important to you as guides for how to behave, or as components of a valued way of life. Feel free to add any values of your own to this list.

PERSONAL VALUES CHECKLIST

- Achievement
- Advancement and promotion
- Adventure
- Arts
- Autonomy
- Challenge
- Change and variety
- Community
- Compassion
- Competence
- Competition
- Cooperation
- Creativity
- Decisiveness
- Democracy
- Economic security
- Environmental stewardship
- Effectiveness
- Efficiency
- Ethical living
- Excellence
- Expertise
- Fame
- Intellectual status
- Leadership
- Location
- Love
- Loyalty
- Meaningful work
- Money
- Nature
- Openness and honesty
- Order (tranquility/stability)
- Peace
- Personal development/learning
- Pleasure
- Power and authority
- Privacy
- Public service
- Recognition
- Relationships
- Religion
- Reputation
- Security
- Self-respect
- Serenity

PERSONAL VALUES CHECKLIST (CONT.)

- Fast living
- Fast-paced work
- Financial gain
- Freedom
- Friendships
- Having a family
- Health
- Helping other people
- Honesty
- Independence
- Influencing others
- Inner harmony
- Integrity
- Sophistication
- Spirituality
- Stability
- Status
- Time away from work
- Trust
- Truth
- Volunteering
- Wealth
- Wisdom
- Work quality
- Work under pressure
- Other: _____

Step 2: Elimination. Now that you have identified ten values, imagine that you are only permitted to have five. Which five would you give up? Cross them off. Now cross off another two to bring your list down to three.

Step 3: Integration. Take a look at the top three values on your list.

- How would your life be different if those values were prominent and practiced?
- What does each value mean, exactly? What are you expecting from yourself, even in bad times?
- Does the personal vision you've outlined reflect those values? If not, should your personal vision be expanded? Again, if not, are you prepared and willing to reconsider those values?
- Are you willing to create a life in which those values are paramount, and help an organization put those values into action?

Which one item on the list do you care most about?

Putting Vision into Action

After defining and clarifying your vision and values, the next step is to reflect on how to put them into action. You will consider the things you care about most as well as your innate talents and skills to determine what about your current life you would like to refine, or even change. You are probably passionate about specific interests or areas within your life; if you're really fortunate, you will have opportunities to participate in one or more of those areas.

The purpose of this exercise is to consider how best to incorporate your passions into how you make a living. You likely have passions that will always remain in the realm of hobbies; the main point of the exercise is to move closer to identifying your passions and expressing them in as many areas of life as possible.

In our experience, part of figuring out what you want to do is paying attention to what you find profoundly interesting. Those interests simply reveal themselves in the course of your daily interaction with peers and colleagues, and quite frequently at business functions. They are reflected in whatever you find yourself reading; they even display themselves in the context of more casual occasions, and are often seen in activities shared among friends.

This is the type of exercise that appears very simple on the surface, and may be something you revisit annually in order to refresh what is genuinely important for you. We find that revisiting allows you to nurture a sense of continual clarity about your direction. Iteration provides a mechanism for clarifying your direction as you grow and develop. With everything you try (false starts and all) you will discover a deeper truth about yourself that moves you closer to your most authentic passions. Some of those passions will be incorporated into your career; other passions help shape your personal life.

Exercise: Putting Vision into Action

Step 1: Identify your foundation. Answer the three questions below by compiling a list of responses to each.

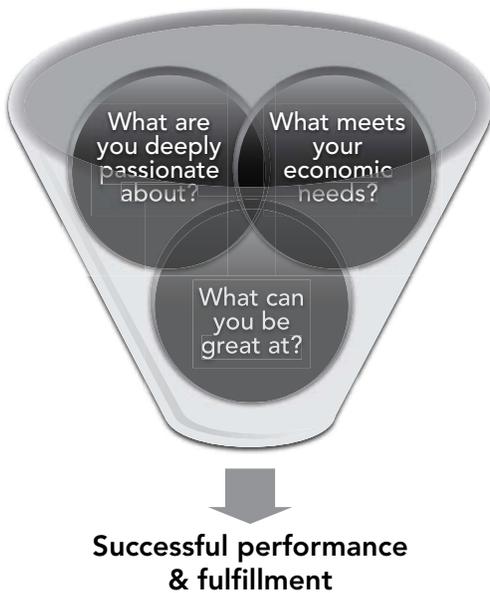
- What are you passionate about? This will come from the prior exercise and should now be relatively concise.
- What meets your economic needs?
- What can you be great at?

**Note - Your answers to these questions should reflect your values from the Personal Values Checklist.*

Step 2: Review and identify overlap. Review your answers and identify the overlaps.

Step 3: Harvest the ideas. Based on the overlaps, do you see anything that might be incorporated in what you do or how you work? This could mean adding an additional service line to an existing business or allocating a portion of your work time to a project that is aligned with your values.

An example of this is a client who, based on significant reflection, learned he valued giving back to the community in a way that he was not doing at the time. He was the CEO of a technology firm. His passion was offering computer training for returning veterans; he maintained the job of CEO and added a community support function into his business. His passion for service to the community and professional skills afforded him the ability to follow his passion and still run a successful business. In the process of following his passion, he is building the workforce in his community and building his reputation as a civic leader and successful entrepreneur.



Vision-Based Actions

Innovative Leadership Reflection Questions

To help you develop your action plan, it is time to further clarify your direction using the reflection questions below. “What do I think/believe?” reflects your intentions. “What do I do?” questions reflect your actions. “What do we believe?” reflects the culture of your organization (i.e., work, school, community), and “How do we do this?” questions reflect systems and processes for your organization. This exercise is an opportunity to practice innovative leadership by considering your vision for yourself and how it will play out in the context of your life. You will define your intentions, actions, culture, and systems in a systematic manner.

Table 3-1 contains an exhaustive list of questions to appeal to a broad range of readers. You will likely find that a few of these questions best fit your own personal situation. Focus on the questions that seem the most relevant. We recommend you answer one to three questions from each category.

TABLE 3-1: QUESTIONS TO GUIDE THE LEADER AND ORGANIZATION

What do I think/believe?

- How do I see myself in the future? What trends do I see around me that impact this view? Have I considered how these trends impact the way I want to contribute?
- How does my view of myself impact me? Am I inspired by my vision? Terrified?
- How do I see myself within the larger environment? This can range from my family, the organization, to the global environment.
- After doing the exercises, what is my vision?
- After doing the exercises, what are my values? What do I stand for? What do I stand against?
- What are the connections between my business vision and my personal mission, passion, and economic goals?

What do I do?

- How do I gather input from key stakeholders to incorporate into my vision (family, business, self)?
- How do I research trends that will impact my industry so I can understand my future placement and how to navigate potential transitions in my industry?
- How do I synthesize competing goals and commitments to create a vision that works for me in the context of the communities I serve (family, friends, work, and community)?
- How do I develop my vision taking the greater economic conditions into account?
- What do I tell others about my vision? Do I have an “elevator speech”? Is it something I think is inspirational?

What do we believe?

- How does my personal vision fit within the larger context of my family, my community, my industry or my job?
- How do I create a shared belief that my vision will help the organization succeed within the larger community and also help the community succeed?
- What do we believe we stand for as an organization? How should we behave to accomplish what we stand for (guiding principles/values)? Do my values align with the organizational values?
- How do I reconcile differences between my values and those of my organization? How will these differences impact my ability to develop toward my vision and goals?

How do we do this?

- How do I monitor the organization’s impact on my vision? How do I honor my vision when helping define/refine the organizational vision?
- What is our process for defining/refining changes to our shared vision for the organization and other systems I function within? What is our process for clarifying and documenting our values? How do I ensure that my values are aligned with our guiding principles?
- Who gives me feedback on their perspective of my progress? How often? What form would I like this feedback to take?
- What measures help me determine progress toward my vision and values? How do I track and report progress toward these goals? Is my behavior supporting the organizational goals? Are the organizational goals supporting my goals?

Introduction to Joey

At age 38, Joey accepted the CEO position of a youth organization that was in crisis. On a daily basis, she is involved in stabilizing the agency by raising its profile, building the programs, staff and board, and raising money and awareness. To help illustrate these reflection questions, we've included Joey's answers. We have tried to capture her internal thought process in these exercises in a way that is rare in a business context, but helpful for the purpose of personal development. We will now walk through answers to one or two questions from each section of Table 3-1. Simply follow along with Joey to answer the questions for yourself, or select the questions that fit your current situation.

What do I think/believe?

■ *How do I see myself in the future?*

I see myself as a person who can significantly contribute to this organization, grow its staff, board, and programs, and improve service to the clients we are privileged to serve. I also see myself as a community leader working not only to improve my own agency, but the community as a whole. I see myself raising my child in a supportive, healthy environment, and ensuring that he becomes a strong, healthy, happy, independent, and productive member of society. It feels discouraging as I look at all the challenges that face my organization today, but even so, I accept the challenge and commit to living and leading with integrity, honesty, and grace, and in grooming and guiding my staff and my family to realize their vision of themselves, and working beside them to create our vision of our future.

There are parts of my vision that I am not sharing here. They include my spiritual goals, relationship goals, and family goals. While I believe these are all critical to living a balanced and happy life, I am not sharing them in this journal because they are very personal to me.

■ *How does my view of myself impact me? Am I inspired by my vision? Terrified?*

I am inspired and a bit terrified. I have always thought all new challenges should be a 45/55 ratio between fear and excitement, and which emotion is greater depends on the day. Today, I feel inspired and the excitement holds greater sway: I am up for this challenge and will lead this organization to success! Along with the excitement is the fear that I will not succeed and that we will have to close the agency; there is also a wariness of the political capital I will have to spend to accomplish my goal, and the toll it will take on my health and my family.

I am aware of my faults and my strengths, and will try very hard to play to my strengths and work to improve in areas that I consider weaknesses. I am very hard on myself and think I should be perfect. I have had to learn that doing my best is as much as I can expect, but sometimes that isn't enough and I beat myself up for what others might consider small issues. I've never been great at asking for help, but I have also never faced the challenges that now stand before me. I will reach out to my peers when I am struggling with a situation, trust my instincts—while acknowledging my biases—and embody my values which I hope to instill as the organization's values.

- *How do I see myself within the larger environment? This can range from my family, the organization, to the global environment?*

I see myself as a leader—of my agency, my community, and my family. Much of my contribution to the world happens through my organization. I work for a nonprofit that is changing the world for the children and families it serves. I want this organization to make a significant impact on our families, and also on how the larger community sees our families. If we are successful, we will impact people on all parts of the planet.

Beyond my work vision, I see myself as a person who tries to respect each individual with whom I come into contact. I believe my work and my kindness will impact the world in a positive way, yet I also acknowledge that leadership requires a certain edge and that the priorities of running a successful organization are occasionally in conflict with the preferences of the staff who serve that organization. As such, sometimes it is a very lonely job, which requires me all the more to have support and balance in all aspects of my life.

What do I do?

- *How do I gather input from key stakeholders to incorporate into my vision (family, business, self)?*

I receive wonderful and positive feedback from my husband who is completely biased and very supportive. I continually seek, but don't always receive, external feedback from my colleagues, board, staff, friends, and constituents about what seems to be working and what isn't. The feedback I do receive comes in varying forms of recognition, frustration, or support. Of course, I continue to judge myself more harshly than others; sometimes people tell me about things I didn't see, wasn't aware of, or an impact I didn't intend. I'm grateful for those instances as they allow the chance for my own professional development. I believe in respectful dissent and try to encourage my team to hold each other and me accountable. It takes a certain self-confidence for staff to do that and I know that some never will possess that confidence. Still, I encourage it by checking in with them frequently about how they feel our relationship is going and directly asking for feedback on my leadership.

At this point in my life, I tend to be very introspective. I pay attention to my thoughts and feelings, and make time to think and reflect. This contemplation allows me to evaluate whether I am doing what I want to do and being the person I want to be. I am aware that many people believe they are following their inner guidance, yet have significant blind spots that interfere with clear, well-aligned actions. I check in with those I trust to make sure I stay grounded and realistic.

- *How do I synthesize the competing goals and commitments to create a vision that works for me in the context of the communities I serve (family, friends, work, and community)?*

I work very hard at living and modeling a balanced life. I work during the hours of daycare which means I do not attend meetings at 7:30 in the morning. I am honest with people

about why. I also leave work a bit early two days a week and announce that I am going to the gym. Nonprofit work is taxing and to be successful in this field we must achieve balance in our lives between work, family, friends, and personal time. If I am not healthy, none of the pieces in my life will be healthy. I have gone through a very deliberate process to create a plan for myself and my personal contributions, and to align my life to that plan. It is an ongoing process. I was raised with the understanding that we each have an obligation to work to make the world a better place and I try to do that.

I also know that no one is going to work harder than me on my own professional and personal development and that my utmost priority is to my child. Having a family requires an on-going realignment of priorities. I believe the more honest I can be about managing the competing priorities of my life, the better I can manage other people's expectations and stay aligned to my goal of living an authentic life. As I align my organization to the plans that govern it, I also have a plan for my own life and align and re-align my life to that plan.

I think of my life as a series of loops and redo-loops, all combining to help me achieve my vision. I always gather information, check that information against my own assessment and values, and gauge everything against my goal. I try out and try on new ideas, those that work I keep in my tool box; those that don't, I put down for now. As I try new things, I fail at some, yet use all the information I have gained—from successes, from failures, mistakes, and home runs—to pave my path and inform my journey.

I believe gratitude is an important force and I try to live and model gratitude. I never imagined I would be living the life I am, and every day I give thanks.

What do we believe?

- *How does my personal vision fit within the larger context—my family, my community, my industry, my job?*

My vision is aligned with the larger nonprofit community. Many of us got into this field because of a deep commitment to social justice issues, and the work is something that is very personal and incredibly satisfying. I'm not sure my extended family understands the work, but they love me and support me anyway. My husband does, of course, and he supports and believes in my vision, which is also our vision. He and I share similar values which has been critical to the success of our marriage and our individual professional success. He is my biggest cheerleader, and as the job is sometimes very lonely, his support allows me to continue to keep my head in the game.

My personal vision is highly aligned with my organization. It is evolving, and the leadership team is very mindful of our collective culture and values and how they impact the organization. As it grows, we are taking more time to ensure that we listen to the values and concerns of others, and integrate them into the organizational systems. We find that people of similar values are attracted to our organization and those who differ significantly simply

are not. As we are aware of our values and seek those with similar values to join our team, our organization has continued to be aligned and on point which has greatly contributed to our success.

- *What do we believe we stand for as an organization? What do we believe about how we should behave to accomplish what we stand for (guiding principles/values)? Do my values align with those organizational values?*

We stand for social justice, empathy, personal accountability, respect, and empowerment, and try to instill those values in the children we serve. Our mission and our values are infused throughout our programming, our buildings, and our literature. We are consistent in how people are held accountable and we each work to live those values. That means we treat our clients and everyone with respect, that there are myriad voices at the table when decisions are being made, and our systems support rather than conflict with those values. As we are a nonprofit, it is also visible in how we speak to and about the children we serve and in how they speak to each other and about themselves.

How do we do this?

- *Who gives me feedback on their perspective of my progress? How often? What form would I like this feedback to take?*

Getting feedback as a nonprofit CEO is difficult. Board members and community leaders consistently show their appreciation, which I value. Staff members show their respect, and sometimes their frustration. Yet, concrete, specific feedback is hard to come by. I have learned to ask for it directly, adding that I cannot grow as a professional unless I am regularly evaluated and receive ongoing feedback. My coach has really assisted me in this, as coaching sessions are the one place that I can speak freely without fear of being judged.

There are, of course, measurement tools that provide feedback, impact measurements for the organization, achievement of the strategic plan, and a 360° assessment tool (providing feedback from my board and my staff) that measures individual performance and organizational culture.

- *What measures help me determine progress toward my vision and values? How do I track and report progress against these goals? Is my behavior supporting the organizational goals? Are the organizational goals supporting my goals?*

I am consistently checking in with myself to see if I am aligned with my goals and with my organization's goals. I do a personal assessment each spring to decide if my vision and values should be refined. I also look at the organization's impact goals and take stock of the previous year to celebrate our successes and review what I, personally, could have done differently to better embody my values and the organization's values.

Each spring, we have a full organizational review, with the board and staff, to re-align, revise or recommit to our plan, our values, and our mission. It includes reviewing each system as it compares to best practices, and a review of each person's expectations and professional development goals of the past year and for the upcoming year. We conclude with setting new programmatic and organizational goals for the new year and defining each person's role in meeting those goals.

Your Process of Creating a Compelling Vision

Now that you have read Joey's personal narratives, it is time to complete the exercises and answer the questions for yourself. We encourage you to complete all of the exercises; these exercises establish a strong foundation for your personal vision, values, and course of action; so exercise patience and give yourself time to explore your hopes and dreams as authentically as possible. You will know you've completed this step and are ready to move to the next when you feel you have created a vision and set of values that truly inspire you.

Throughout this chapter, we have discussed exercises that will help you clarify your life direction and create a compelling vision for your own life and work. The next chapter focuses on assessing where you are right now in your career and personal development.

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Author Bios

Maureen Metcalf

Maureen is the founder and CEO of Metcalf & Associates, Inc., a management consulting and coaching firm dedicated to helping leaders, their management teams and organizations implement the innovative leadership practices necessary to thrive in a rapidly changing environment.



Maureen is an acclaimed thought leader who developed, tested, and implemented emerging models that dramatically improve leaders and organizations success in changing times. She works with leaders to develop innovative leadership capacity and with organizations to further develop innovative leadership qualities. Maureen is at the forefront of helping organizations to explore these emerging solutions for long-term organizational sustainability.

As a Senior Manager with two “Big Four” Management consulting firms for 12 years, Maureen managed and contributed to successful completion of a wide array of projects from strategy development and organizational design for start-up companies to large system change for well-established organizations. She has worked with a number of Fortune 100 clients delivering a wide range of significant business results such as: increased profitability, cycle time reduction, increased employee engagement and effectiveness, and improved quality.

Dani A. Robbins

Dani Robbins is the strategist, founder, and principal of Non Profit Evolution, a consulting firm dedicated to building capacity, including board governance and operational assistance, in nonprofit organizations.



Dani is an acclaimed thought leader, practitioner, and speaker, and has served for over 20 years in the nonprofit arena. Dani works with a variety of nonprofit boards and executive leaders to implement stronger and better-aligned organizations. When serving in executive leadership roles Dani turned around, reengaged, and created sustainability in two domestic violence shelters/rape crisis centers, two Boys & Girls Clubs and introduced the Women’s Coalition—the prelude to the Women’s Center—at Case Western Reserve University. She continues to work assisting organizations with board and resource development planning and training, strategic and tactical planning, senior leadership searches, and executive coaching.

Dani has a master’s degree in public administration from the Levin College of Urban Affairs at Cleveland State University, a bachelor’s degree from Kent State University, and is a graduate of Leadership Akron Class 22 and the University of Michigan’s Ross School of Business/Boys & Girls Clubs of America’s (BGCA) Advanced Leadership Program. She is the 2006 recipient of the Vision and Spirit Award from the Boys & Girls Clubs of America’s Midwest Regional Office, and various organizations under her direction have been awarded multiple regional and national BGCA awards for diversity programming, web design, and media proficiency.

Dani is on the forefront of helping nonprofit organizations create goals, build systems to meet those goals, align their objectives, and thrive!

Thank you for reading!

Thank you for taking the time to read the Innovative Leadership Workbook for Nonprofit Executives. I trust the worksheets and reflection questions you completed here will help you become a more effective leader. Because growth has a ripple effect dynamic, we welcome your suggestions, additional tools and templates. Please contact me at:

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This is the second in a series of workbooks. Subsequent workbooks will be written for emerging leaders, public service executives, and more. Download other titles on Innovative Leadership at www.innovativeleadershipfieldbook.com.

Praise for the *Innovative Leadership Workbook for Nonprofit Executives*

As someone charged with the stewardship of a social benefit organization, the challenge is always there to find tools to help navigate what sometimes are obscure paths to create change. We find ourselves adrift without a comprehensible map to guide us. The workbook is an insightful tool that serves not only as a compass, but as a catalyst to embrace self-development as a lifetime process and leadership as lifelong learning.

Elisa Sabatini, Executive Director, Via International



The *Innovative Leadership Workbook for Nonprofit Executives* lays out a process for transformation, and includes a discussion of organizational culture, an exploration of and tools for improving personal and professional leadership style, and an in-depth description of the role of the nonprofit CEO. This is a must-read for senior leadership staff and the boards they serve.

John Hrusovsky, Partner QSI, former CEO, GroundWork group



The development process and tools laid out in the *Innovative Leadership Workbook for Nonprofit Executives* provide a clear direction for nonprofit leaders to strengthen and increase their skills. Particularly during times of funding cuts—but increased needs—our leaders need to invest in their own skills to ensure they can optimally deliver for their agencies.

Sidney R. Hargro, Executive Director, Community Foundation of South Jersey



The *Innovative Leadership Workbook for Nonprofit Executives* offers an honest development journey of a leader in a community-based nonprofit. Her insightful story provides an example of how an individual—sharing power with colleagues and stakeholders as part of an organization—can change a community. Use this workbook to supercharge the impact you make by continuing to develop your leadership skills.

Philip Cass, Ph.D., Chief Executive Officer, Columbus Medical Association and Affiliates



The *Innovative Leadership Workbook for Nonprofit Executives* provides valuable insight and information for nonprofit executives. The case study offers a beautiful example of the personal development journey of an experienced nonprofit executive. The workbook is a must have for your personal development and for that of your team. Skillfully written and well designed, the workbook leads readers on a path toward personal and professional growth and increased effectiveness.

Paul Pyrz, President, LeaderShape



I know the *Innovative Leadership Workbook for Nonprofit Executives* will become a favorite tool for nonprofit thought and action leaders for its practical, no-nonsense and comprehensive approach to building effective and compassionate leadership skills and attitudes during this period when nonprofit outcomes and results are more important than ever for our communities.

Robert A. Kulinski, President, United Way of Summit County

Holding the reins of a community-based nonprofit is a challenge in the best of times and much more difficult in challenging times. The *Innovative Leadership Workbook for Nonprofit Executives* offers steps for improving your own leadership style and transforming your organization. The “fly on the wall” access as one CEO figures out her path forward reminds us that we are not alone. Buy it, implement its wisdom, and get ready to soar!

Natasha Spears, Executive Director, Boys & Girls Club of Dayton



There are compelling reasons for re-evaluating our notions about leadership and innovation. The landscape for leadership has changed. The stakes are higher and the demands for innovation never have been so great to solve our most pressing problems. The *Innovative Leadership Workbook for Nonprofit Executives* is a response to these realities. It provides the opportunity and an open invitation to take a good look at yourself as a leader through an exploration of six stages of leadership development that are essential for new levels of effectiveness, contribution, and results. What I like most about the book is its thoughtful, practical, step-by-step approach to re-evaluating and reinventing how you lead. It is one of those books that become a ready-reference for your personal ongoing leadership journey of renewal and growth.

Debbe Kennedy, Founder, President and CEO, Global Dialogue Center and Leadership Solutions Companies, Author of *Putting Our Differences to Work: The Fastest Way to Innovation, Leadership, and High Performance*



The seismic shifts in both the economy and the nonprofit sector over the last decade require all leaders to reassess how they lead and manage towards accomplishment of mission. Robbins and Metcalf have taken both their successful and not-so-successful experiences, and used them as valuable teaching tools for the rest of us. The *Innovative Leadership Workbook for Nonprofit Executives* is a guide that each board member and leadership staff should go through as part of leadership development. It forces each leader to create a compelling vision that motivates real change, and gives them the tools and processes to realize that change.

John R. Miller, Regional Vice President, Boys & Girls Clubs of America



Authors Metcalf and Robbins draw upon their own experiences and research to cast a fresh, insightful eye upon what it takes to innovatively lead a nonprofit organization in a quickly changing world. This is a must-have manual for any nonprofit leader, board member, or individual aspiring to become an organizational leader. Metcalf and Robbins write in a lively style, pose lots of compelling questions, and offer plenty of practical examples to illustrate their points. Readers will find the module-style of this workbook to be enormously useful—boards can use modules independently to enhance strategic planning sessions, while leaders can work sequentially through the modules to maximize personal growth. Metcalf and Robbins not only force us to ask important and difficult questions of our own leadership styles, but challenge us to create a dramatically more productive future for our organizations.

Megan Kilgore, Founder and Board President, Ohio Women in Public Finance

