

Session 3: LEADing to Action

Overview

Purpose: During this session, participants will:

- Complete a plan of action
- Establish an organized structure and communication plan
- Consider succession planning

Estimated Time to Complete: 3 hours

Materials Needed:

- Nametags
- Name tents
- Sign in sheets
- Flip charts
- Markers
- Notes from civic forum

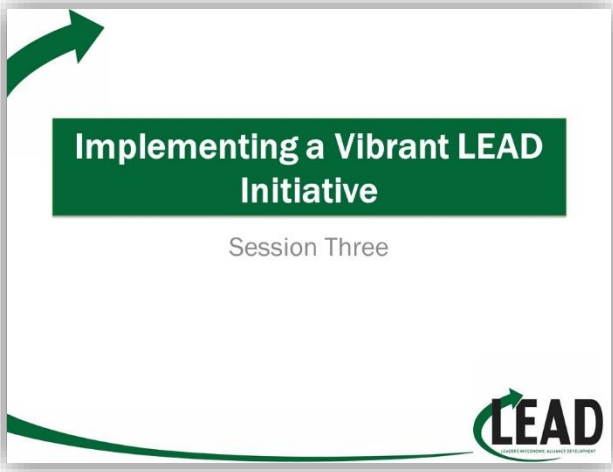
Handouts:

- Plan of action chart

Slide 1

Instructions

Have this slide showing on the screen prior to the start of the SET Planning Team meeting.



SLIDE #1

Time: Opening slide, 5 Minutes

Supplies: none

Handouts: none

Slide 2

Instructions

Welcome participants to the session and briefly review the goals from this slide.



Goals for this Session

- Complete a Plan of Action
- Establish an organizational structure
- Develop a communication plan
- Consider succession planning
- Establish practices for maintaining momentum



SLIDE #2

Time: 5 Minutes

Supplies: none

Handouts: none

Slide 3

Instructions

Prior to the start of the session, list the top opportunities identified during the civic forum on which initial work was done during that event.

Ask for a volunteer from each opportunity team to briefly summarize the initial planning thoughts from the forum.

Divide the group into teams around the various opportunities, allowing them to self-select into the team that most interests them. Share copies of notes from the opportunity discussions at the Civic Forum.



Opportunities from the Civic Forum

- [List the top opportunities from the forum]

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SLIDE #3

Time: 10-20 Minutes

Supplies: Copies of notes from the Civic Forum

Handouts: none

Slide 4

Instructions

The purpose of this quick and fun exercise is to get the group thinking about how to create a detailed plan of action. However, don't share that at this point.

With a blank flip chart page handy, announce that the team is going to:

Make 1 peanut butter and jelly sandwich for each person for lunch (supper/snack) by [some reasonable timeframe based on your schedule],

but you need their help. Ask participants to help you develop a plan for making the sandwiches. What needs to happen? Quickly jot down steps as they are mentioned. Once the steps are fairly well outlined, ask about the order of the steps: what needs to happen first, second, etc. Finally, ask for a volunteer for each step. As each volunteer agrees to a step, ask them how long it will take them. [They will likely answer in terms of minutes, which is fine for the exercise.] Jot the volunteer and the time expectation beside each step.

Once the process is complete, have the group step back to look at the whole plan and consider:

- Are all the steps in place? Did we miss anything?
- Does the timeline make sense? Can we meet our deadline of [lunchtime]?

Then use this time to provide some leadership on how to manage the process. For instance:

- What would the group have done if no one had volunteered for a particular step?
Possible responses: (1) Ask, who do we know that could do this step and then, who will volunteer to ask them. (2) Find a way around the step – can we do this another way?
- What if someone's timeline throws the group's target timeline off? Possible responses: (1) Ask if the volunteer can shift their timing, (2) See if someone else could take on that step with a timeline that fits better.

Once the group seems to feel comfortable with the flow of this exercise, move to the next slide for application of these principles of planning.



Taking Action

OR:
Making a
Peanut
Butter
And
Jelly
Sandwich

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SLIDE #4

Time: 15 Minutes

Supplies: Flip Chart & Markers

Handouts: none

Slide 5

Instructions

Note that before the session, you will need to add in a relevant time frame to the green box (i.e. "noon," or a specific time). Using the simple model of making sandwiches, describe the elements of a SMART goal. Ask participants to identify these elements in the simple PBJ sandwich goal.

Then, have groups define a SMART goal for their opportunities. For the sake of this initiative, the goal can (and perhaps should) be something that has a relatively short timeline (a year or less) that clearly meets all parts of the SMART criteria.

If more than one group exists, have groups share their results with the other groups.

Write a Clear Goal Statement

- **S**pecific
- **M**easureable
- **A**ttainable
- **R**elevant
- **T**ime framed

Make 1 peanut butter and jelly sandwich for each person in this room by [timeframe]

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SLIDE #5

Time: 15 Minutes

Supplies: Flip Charts and markers for recording final SMART goal(s)

Handouts: none

Slide 6

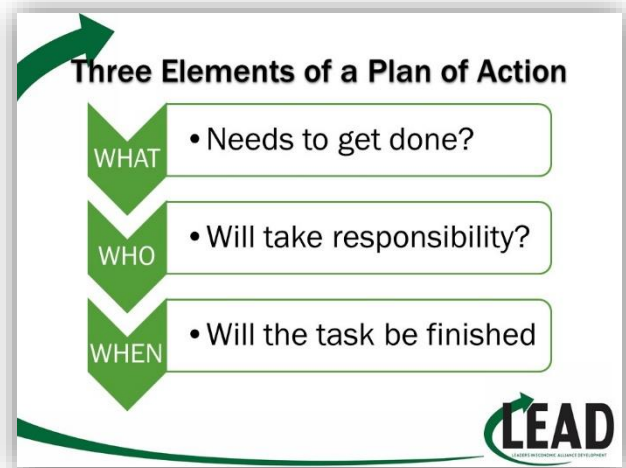
Instructions

Introduce participants to the basic elements of a Plan of Action so they can draft their own plan. Have each group working on a specific goal to outline the steps needed on a flipchart and then go back and number them in order. Next they would identify a person to take lead on each step. One rule: they cannot put someone's name on that is not in the room. If someone is needed for the plan of action that isn't present to volunteer, then an action step has to be that someone in the room will contact them to gain their support. Next, the person volunteering identifies the date they can have the task complete.

Four basic elements make up a viable Plan of Action:

- Specific steps to launch the identified strategy – What steps would need to be taken to help move from where you are now to the point where you are launching your identified strategies? Have the teams to break the steps into manageable 'bites' and arrange the bites into a logical order.
- A person who will take leadership for each of the steps – The team cannot move forward if you have an 'unclaimed' step. Steps should be shared evenly among the partners so the load is not shouldered by just a few partners. Also, avoid assigning steps to 'all team members' unless it is a task that everyone really must have a role in carrying out (something that's pretty unusual for most team assignments). The old adage applies here, 'Everyone's job is nobody's job.' If a step does need to be shared among more than one person, ask for a 'lead' to help keep the step on track.
- A realistic timetable for completing each step – Keeping things rolling is vital! Having a timeline for completion of tasks is very important. Avoid assigning deadlines when possible. Instead, ask each person who takes ownership of a task when he can realistically complete the step. This accomplishes a few worthy goals. First, it enhances the individual's buy-in to the timetable. If I make a commitment to complete a task by a certain date, it carries much more weight with me than if you assign an arbitrary date that does not take into account my other obligations or constraints. Second, it can help identify potential roadblocks or stumbling points. For instance, suppose a person accepting a step indicates he or she cannot complete the step until two months from now. Other steps are now 'on hold' for completion of that step. If the two-month delay will threaten forward movement, it may be a good idea to either negotiate the date with the person, or see if someone else would be willing to take on the step within a shorter timeline

This process is important for implementation as it promotes responsibility, outlines initial tasks and establishes timelines.



SLIDE #6

Time: 20 Minutes

Supplies: Flip Chart & Markers

Handouts: Plan of Action Chart

Slide 7

Instructions

Once the Plan of Action is developed, the team is ready to move forward on implementation. This is a key turning point that may determine the success of the initiative. Thinking intentionally about how the team will implement the proposed project(s) is vital to success. This next section explores some common challenges encountered during this phase and provides time for the team to plan around those challenges.



SLIDE #7

Time: 1 Minute

Supplies:

Handouts:

Slide 8

Instructions

Some valuable insights have been collected on what has gone well and what bumps have been experienced through projects similar to LEAD. This segment is intended, in part, to tackle these issues head-on, preventing problems that could compromise the long-term sustainability of the LEAD efforts. Four key concerns are examined as well as ideas on how to avoid these issues from cropping up with this LEAD team.

Common Challenges

1	How will we organize this work to ensure implementation?	2	How do we maintain communication within the group?
3	How Do We Handle Turnover of Team Members?	4	How Do Keep the Momentum Going Over the Longer-Term?

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SLIDE #8

Time: 1 Minute

Supplies: none

Handouts: none



Slide 9

Instructions

The first challenge is determining how the LEAD effort will be organized. Having some sort of organizational structure helps ensure that the parts don't become disconnected and also ensures that progress is made. A number of different models are possible. A few are listed on the screen, but certainly, others would work also.

The important question for the group to answer is "What approach will work best here to ensure that the LEAD actions move forward?"

Allow ample time to discuss and decide upon a structure. Questions to consider:

- Who can help us stay connected?
- What would we expect that person (persons) to do?
- How long would we want that person (persons) to lead? Do we rotate responsibilities, and if so, how often?

The next slide discusses a related aspect, establishing a meeting schedule.

**Challenge #1:
Organizing the LEAD Effort**

Different models that work:

- One team leader with committee chairs
- Co-leaders with committee chairs
- Committee chairs form a leadership team

What approach might work best here?

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SLIDE #9

Time: 5 Minutes

Supplies: none

Handouts: none

Slide 10

Instructions

A second step of organization is to establish a regular meeting schedule. Having a set time to reconvene on a regular basis helps ensure that the work progresses forward. Have the team consider the questions on the slide in order to determine their schedule.

Establishing a Meeting Schedule

- How often to meet face-to-face?
- Where is the best place to meet?
- When?

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SLIDE #10

Time: 5 Minutes

Supplies:

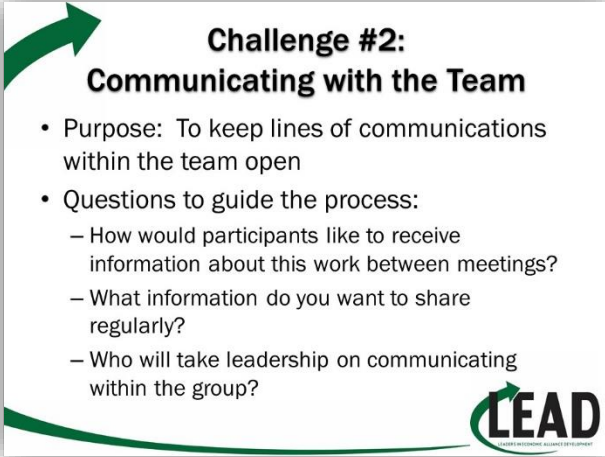
Handouts:



Slide 11

Instructions

Ensuring timely communication among LEAD team members is the second step to sustainability. Using the guiding questions on the slide, guide the team to developing their communication plan.



**Challenge #2:
Communicating with the Team**

- Purpose: To keep lines of communications within the team open
- Questions to guide the process:
 - How would participants like to receive information about this work between meetings?
 - What information do you want to share regularly?
 - Who will take leadership on communicating within the group?



SLIDE #11

Time: 5 Minutes

Supplies: none

Handouts:

Slide 12

Instructions

Helping the team consider how they will plan for changes in the team's make-up is important. The next few slides will guide that discussion.



SLIDE #12

Time: 1 Minute

Supplies: none

Handouts: none

Slide 13

Instructions

Every group will experience some degree of turnover and this is likely to be the case with LEAD. Some people will leave the Team due to job changes, family obligations, illness/death, burnout, or a desire to volunteer for some other worthwhile project in the community or region. The question that most groups have to wrestle with is how to have in place a plan for replacing team members as they depart the group. Consider these two possible situations.

Emergency Succession: Occurs when there is a sudden departure of a key leader from an organization or company.

Planned Departure: Happens when a leader of the group has opted to retire or to move to another community, but has provided notice several weeks or months before his/her departure. What would you do? What are the unique challenges of these two situations?

[Allow time for discussion]

Two approaches are discussed in the following slides to give some ideas to the team. These include:

Talent Development: Involves developing a pipeline of talent that can be tapped to join a group when a member of the team departs.

Replacement Planning: A short-term solution for handling turnover of members



SLIDE #13

Time: 10 Minutes

Supplies: none

Handouts: none

Slide 14

Instructions

Every group should take time to focus on internal talent development. The LEAD Team should identify individuals within the group that have the interest and inclination to take on additional responsibilities associated with the LEAD effort in the future. In order for their transition into a leadership role on to run smoothly, it is vital for these individuals be mentored over an extended period of time by existing members.

Beyond efforts to build the team's internal strength, the LEAD team should keep an eye on other individuals in the community that may be excellent candidates to join the LEAD team. One possible strategy is to recruit a good mix of talented people to take part in an existing community leadership development program and once the training is completed, invite interested participants to join and support the activities of the LEAD Team.

Expanding the pipeline of talent by drawing on graduates of a local community leadership development program to serve as new members of the LEAD Team makes sense.

[Allow time for discussing how this might work in this community.]



Talent Development

- Develop a leadership readiness pipeline.
- Focus on building internal strength
- Train/mentor younger or less experienced team members.
- Look for community members that may be recruiting to the LEAD team.

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SLIDE #14

Time: 5 Minutes

Supplies: none

Handouts: none

Slide 15

Instructions

Sometimes even the best of succession plans leave open spots. Replacement planning is a way to respond to openings that may occur in these gaps. The slide outlines the typical process involved in securing new members to join the group.

In the case of LEAD, if the group wishes to embrace this succession planning strategy, the process can be strengthened by having a solid job description. This allows the person being recruited for the team to have a good understanding of the responsibilities that he/she is expected to carry out.

In addition, the LEAD Team should try to identify individuals with the knowledge and skills that are needed by the team as it works on developing and implementing its plan.

Finally, new members should be mentored to help them get “up to speed” on what the LEAD Team has accomplished to date and what important work remains to be done. Mentoring is a valuable mechanism for accelerating the ability of new members to become positive contributing members to the work of the team.



Replacement Planning

- Involves asking for volunteers willing to fill a vacancy
- May include a personal one-on-one appeal
- Improve the process by:
 - Having a job description to share
 - Examining roster of members and proactively target viable candidates
 - Providing mentoring opportunities

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SLIDE #15

Time: 5 Minutes

Supplies: none

Handouts: none

Slide 16

Instructions

Provide time for the LEAD team to consider the mix of internal and external succession strategies that should be considered. Have them consider how to develop leadership talent from both within the team and from outside (those not yet involved but that would provide needed skills or knowledge.)

Give them 10 minutes to generate ideas. If the group is large enough, you may want to divide them into two teams to consider these questions. As a team, discuss the recommendations offered by the two groups and then decide on the specific succession strategies your team will implement

What Succession Strategies Should We Use?

<p>INTERNAL (within the team)</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 	<p>External (outside the team)</p> <ol style="list-style-type: none"> 1. 2. 3. 4.
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SLIDE #16

Time: 15 Minutes

Supplies: none

Handouts: none



Slide 17

Instructions

Keeping the momentum, or action, moving is the final challenge to discuss. These bullets provide some guidance to help ensure that the project(s) move forward.

Start by **using the Plan of Action to track progress**. Each time the group meets, one of the first tasks should be to review and update the Plan of Action. Using one of the team's actual Plan of Action charts created at the start of this session, model how this can be used to track progress. As the group to imagine it is a month [or other appropriate time period] down the road and they are meeting again. Beginning with the first step listed, ask the volunteer that agreed to take that step to report on progress for that step. If complete, **document the progress** by adding the completion date and any relevant information in the last column to the right. Continue moving down the list asking the respective volunteers to share their progress. If you come to a place where someone has hit a challenge and thus has not been able to complete a task, stop and **brainstorm strategies to address the challenge**. What can be done to overcome the particular challenge? Does the timeline need to be shifted? Does someone else need to volunteer to assist with the step? Is there another path to go around the challenge? Be sure to document any additional steps or changed steps as the group works through the challenge.

Then, as projects are complete, **celebrate successes**. Be sure to **include and inform local stakeholders** so that buy-in, interest, and support for the efforts can continue to grow.

Finally, as projects are successfully completed, use the energy from that success to **continue climbing**. What can the group accomplish next? How can we continue to build on this victory? (Remember the spiraling up concept from Session 2).

Discuss together: What other ideas do you have for ensuring we continue to make progress?

**Challenge #4:
Keeping Momentum Going**

- Use the Plan of Action to track progress
- Document progress
- Brainstorm strategies to address challenges
- Celebrate successes
- Keep local stakeholders informed of progress
- Continue climbing

Document progress

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SLIDE #17

Time: 10 Minutes

Supplies: Plan of Action chart from one of the groups

Handouts: none

Slide 18

Instructions

Use this slide as a review/summary of the team's plans moving forward. If not already assigned, someone from the team needs to type the Plan of Action for use in future meetings.



SLIDE #18

Time: 1 Minute

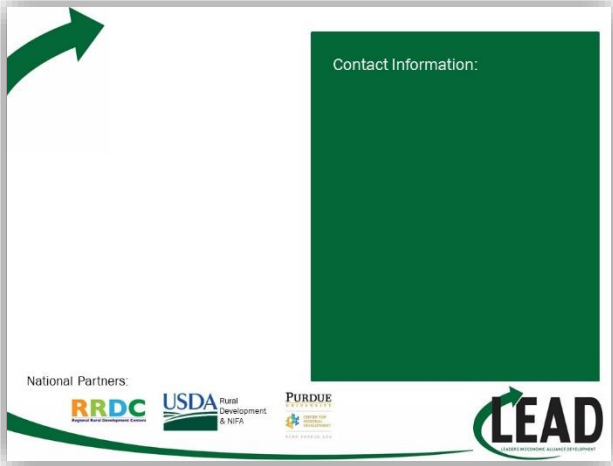
Supplies: none

Handouts: none

Slide 19

Instructions

Be sure to insert your contact information and logos prior to the session



SLIDE #19

Time:

Supplies:

Handouts: