**Notes for PPT changes**

* Add design team headshots

9/9/17

**Timeline for day:**

* 7:30am: Staff arrives
* 8:00am: Breakfast arrives
* 8:30am: Breakfast & registration
* 9:15am: Session 1
* 11:00- 11:20: Break #1
* 11:20- 12:30: Session 2, Part 1
* 12:30- 1:30: Lunch
* 1:30- 2:45: Session 2, Part 2
* 2:45- 3:00: Break
* 3:00- 4:30: Session 3
* 4:30- 5:00: Closing & logistics for the evening -- Liz Erickson will lead this

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| **Opening: 9:15- 9:45** * Bobby owns opening (talking points, welcome feel - introduce staff, welcome each other - introduce themselves)
* Names, something that would surprise others if they found out about you
* 12 minutes for whole group to introduce
	+ MAKE “Meet Each other a Game” -- I’ve worked with a lot of groups and the shortest amount of time it’s taken a group this size is 12 minutes (amp them up)
* Goals and agenda for the day
* Logistics -- bathroom, food, norms, lean in, self care
* State -- One thing you’re hoping to learn/looking forward to this weekend
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| **Session 1: Leadership in Practice: 9:45- 11:00****Goals of this session:** * Coaches should develop a deeper understanding of the challenges and best practices to accomplishing goals through an effective team.
* Coaches should learn new skills for communicating, leading, and directing a team to success.
* Coaches should start deconstructing their definition of “effective leadership”

**Outline:**TIME: 75 mins**(0:00 - 0:10) WELCOME & INTRODUCTIONS*** Introduce the trainers for the section
* Personal examples of applying leadership
	+ Could we add something here about all of us thinking, “I could do that better than that person?” And when we are put into leadership positions, we need to know our strengths and our weaknesses; then give a personal example.
	+ Failures and lessons learned
	+ Success and identifying as a leader
* Agenda

**(0:10 - 0:50) PRACTICING LEADERSHIP: ACTIVITY**(0:10 - 0:20) Instructions & Breakout* *Activity Set-up:*
	+ *Breakout:*
		- When you entered the room, you each received a card with a number with a group name and number -- I.E. Obama 4
		- Look around the room -- you will find your group name displayed on a piece of poster paper. When we say, that is where you should go.
			* If you are a 1, you are the “Director”
			* If you are a 2, you are the “Runner”
			* If you are a 3, you are the “Drawer”
			* And if you are 4, you are the “Observer”
		- Each one of you has a distinct role to play, which will be explained shortly.
* *Activity Instructions:*
	+ Each group will be broken out into groups of 4 according to the roles above. The goal of this activity is to work as a team to replicate a drawing as exactly as possible. The trick is that each person plays a specific role to make the skills of communication, delegation, and management critical to your success. Here’s how it works:
		- The Director is given a drawing on a piece of grid paper, and is the only person who can see it It is the director’s job to give clear and specific instructions to the Runner, so that Drawer can make an exact replica of the drawing.
		- The Runner listens to the Director’s instructions and runs to a different part of the room to where the Drawer is sitting. The Runner then passes on the instructions to the Drawer, without seeing the drawing. The Runner can make as many trips as required within the time allowed for the exercise.
		- The Drawer listens to the Runner’s instructions and draws the object based on the instructions. The Drawer is the only person who can see the replica drawing.
		- The Observer watches all aspects of the game and make notes about what works, what doesn’t work, and how people behaved under pressure etc., to pass onto the group later in the debrief.
	+ Each group will have 15 minutes to complete their drawings. The goal is to get an exact replica of the original drawing, as specific as it can be. Teams can use any communication system they want in order to do this, as long as the Runner never sees either drawing, the Director only sees the original, and the Drawer only sees the replica.
	+ At the end of 15 minutes, each group will have 7 minutes to debrief their results. The observer will lead the discussion based on the notes they took during the game, and they will analyze where they made mistakes, how they could improve them, and where the successes and challenges came from in the game.

(0:20 - 0:50) Activity(0:50 - 1:00) Breakout Group Debrief* Did your group succeed in “building” the model towards the director’s specifications?
	+ Why or why not?
	+ How are you defining success?
* If you were the director -- what was challenging in communicating what needed to be done? What leadership skills did you use to overcome those challenges?
* If you were the runner -- what was challenging in conveying the director’s instructions to the builder?
	+ What leadership skills did you observe being employed by the director? Did they work?
	+ Did the builder feel they were being communicated effectively to by you? How did you try and coach the builder?
* If you were the drawer -- what was challenging about carrying out the instructions? Did you feel you were being coached in a particular way? Was it effective?
* If you were the observer -- your role is pertinent in terms of debriefing for a team. What did you observe in terms of these four things that added to the success or challenges of your team?
	+ Communication style
	+ Coaching style
	+ Training style
	+ Leadership style
* Lastly, how does this exercise relate to your organizing work? Does it make you think differently about it?

**(1:00 - 1:15) FULL GROUP DEBRIEF*** *Raise of hands --* Which groups successfully completed the “model”?
	+ From the observer’s perspectives, in what specific ways did the director and runner of the group coaches and communicated the builder led to this outcome?
	+ From everyone’s perspectives, what ways in which the director and runner of the group communicated to the drawer led to this outcome?
* *Raise of hands --* Which groups struggled with completing the “model”?
	+ From the observer’s perspectives, what challenges in communication or coaching on your team were you able to observe?
	+ From all group’s perspectives -- what were the challenges?
* *Questions --*
	+ What specific communication styles did you observe being demonstrated in your teams?
	+ What were leadership tactics did you observe being employed within your teams?
	+ How did this activity make you think about coaching and leading?
	+ Much like this activity -- OFA’s training programs depend upon different coaching and leadership styles in a team setting to be successful. In your organizing work, what real life observations about coaching and leading styles do you think about?
	+ Did this make you think differently about how your leadership styles in coaching/management?
* *Key takeaways --*
	+ Each will be prepared to identify answers from questions around these subjects:
		- The experience training fellows or students in your respective programs
		- Different coaching and training tactics they used and when they used them.
			* Situational Leadership
			* Challenging conversations
			* Diagnoses and Treatment
			* Emotional phases in organizing
		- Identify with challenges faced managing fellows and students through project management
		- Creating a team culture

**BECOMING A LEADER*** “With great responsibility comes great power”
	+ As a leader, we have to be more mindful of our actions, especially communication
	+ Our actions not only affect our direct work, but the work and actions of our entire team
* Transitioning from a “do-er” to a “lead-er”
	+ As a high-achieving do-er, most of the work accomplished is directly the result of your efforts
	+ As a high-achieving lead-er, most of the work accomplished is directly the result of your team.
	+ How do we lead effectively and maximize the potential of our teams?
* Random survey:
	+ What’s the most important quality of an effective leader?
		- Hopefully the majority or a good chunk say communication
* Communication is key
	+ But it’s not simply stating what to do.
	+ Communication requires deep emotional and social intelligence.
* We’re going to do an activity to demonstrate the power (and challenge!) of effective communication.
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| Session 2: Knowing your strengths **Goals of this session:** * Leaders will grow in their awareness of their strengths and weakness, both as individuals and as a group
* Leaders will analyze values and assumptions they have that are barriers to living out that role

 PRE-WORK* Strengthsfinder assessment codes
* Interview people close to you - ‘when have you seen me at my best? What was happening?’

 PURPOSE AND RATIONALE: Many times leaders forget their strengths. They get caught up in their weaknesses- almost everyone at some point begins to cite how they are bad at XYZ task. This can sometimes stump us when we think about what we want to be true in our country. We have big dreams, but then we think, “Who am I to do that?” Also, with all the demands of life, we often forget who we are as a whole person. We will use these strengths-finders results at the retreat to come back to what we are strong at and reflect how we can leverage these strengths both with the people we are coaching and for ourselves. Pt 1: UNDERSTANDING OWN STRENGTHS Opening & Assessment taking (30 minutes) * Share purpose and rationale above
* Share what strengthsfinder is: *Based on a 40-year study of human strengths, Gallup created a language of the 34 most common talents and developed the Clifton StrengthsFinder assessment to help people discover and describe these talents.*
* Give out codes: take the assessment

Modeling & Reflection (30 minutes)* Directions: Individually, read through the PDF that you printed from your strengths-finder assessment. What did you agree with? What were you surprised by? Do you think others see this strength in you? You should also reference conversations you had with stakeholder and their experience with you.
* Questions:
	+ How do you feel about your strengths?
	+ How do they compare to what people have said about you?
	+ Where have you seen your strengths play out, both personally and professionally?
	+ Was there a strength you expected to see, but didn’t see?
	+ How might your strengths complement one another? How might they be in conflict?
* Liz models examples from experience
* Time to reflect
* If time, protocol:
	+ Share stories with a partner; time to ask questions and affirm (10 minutes each)
	+ Partner 1: Set timer for 7 minutes and talk only about you and your strengths; final 3 minutes is time for partner to affirm and ask questions
	+ Partner 2: Switches; Partner 2 talks for 7 minutes; final 3 minutes is for questions and affirmations
* Closing before lunch: Individually, locate where your strengths are in the domain categories. What areas are you individually weak? What areas are you individually strong? How have you seen this play out in teaching?

 LUNCH  Pt 2: APPLICATION Directions- strengths headlines (10 Minutes)* What are your strengths headlines? How do your strengths interact with one another? What roles do you see yourself playing with the interaction of these strengths?
* Liz’s Example: Communication, positivity, woo -- power to influence and build relationships have come up for me again and again. I figured this out through looking at my strengths over time, compared to Myer’s Briggs results, and synthesized answers from the principals that I interviewed that I work with. This makes me have certain dreams for my team that I currently work with in the office-
* Liz’s headline: I have the power to get a group of people excited to do something
* Options for application (have poster created with options)
	+ How do these headlines interact with each other?
	+ Think through a situation that you face everyday- how do you bring a strength to that situation- staff meeting; how could this view of your strengths impact this experience in a different way?
	+ Web describing strengths
	+ Metaphor: If your strengths were an animal, what animal would they be?
	+ Headlines of strengths, headlines with weaknesses
	+ Headlines, passions, dreams example

Individual work time: (20 minutes) Partner sharing (20 minutes)* 10 minutes of sharing with questions; preferably in groups of people you will likely work with in next few months

 Whole group debrief (10 minutes)* What did this process reveal for you?
* Share metaphor of strengths in the sun, shadow
* Where are we collectively strong? Where are we collectively weak?
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Fall 2017 Coaches Huddle: Session 3 - Leadership Theory

Objectives:

*Coaches will be able to…*

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| *Individual*  | *Team*  | *OFA* |
| * Feel capable of becoming the leader that they need to become
* Develop self-awareness around their archetype of a leader
* Feel that their assumptions of leadership have been challenged
* Feel like they want to grow and learn more!
 | * The team will feel more connected to the idea of leadership and how to apply it to their fellows and students
 | * As a movement, leaders will begin to grow and transformatively work with their fellows and communities
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Pre-work:

Session Plan:

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| *Time* | *Activities*  | *Things needed*  |
| 3:00- 3:15 | * Review agenda and objectives for the day; framing for session
* Frame the day in terms of leadership, drawing an arc throughout the day (10 minutes)
	+ Today, we’ve had the opportunity to see have some fun, really dig into our strengths, and
 | * Agenda/objectives on slides
* Worksheets
 |
| 3:15- 3:30  | * People will breakout into groups 2-3 (give about five minutes to do this as they will need to spread around)
* In their groups, they will have butcher paper, markers
 | * Butcher paper
* markers
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| 3:30- 3:50 | **EXPERIENTIAL ACTIVITY 1:** * REFLECTION: Individually, list your top 5 leaders on a piece of butcher paper (5 minutes)
* INSTRUCTIONS/ROLEPLAY (Bobby/Liz): Bobby and Liz will role-play the next activity, which is to Describe the people they listed.
	+ Describe attributes
	+ Describe demographically
	+ Describe what makes them a good leader
	+ Bobby will respond with what values I am able to pull out of the leaders Liz lists, as well as the descriptors (10 minutes)
* PARTNER DISCUSSION 1:
	+ Partner 1 will share their leaders descriptions ( 5 minutes)
	+ Partner 2 will share their leaders descriptions (5 minutes)

**ROLEPLAY (WITH LIZ)*** *Nelson Mandela*
* *FDR*
* *Fannie Lou Hamer*
* *Dolores Huerta*
* *Bobby Kennedy*
* REFLECTION: Each pair will take 3 minutes to reflect on, and write, the values and blind-spots they see present in their partner’s leaders list, as well as their list of leaders (3 minutes)
* PARTNER DISCUSSION 2: Partners exchange the values and blind-spots they drew out of the list of leaders (10 minutes)
* BIG GROUP DISCUSSION - What values did your partners come up with? What surprised you?(5 minutes)
 | * Role-play conversation prepared
* **VALUES on butcherpaper**
* **BLINDSPOTS on butcherpaper**
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|  | **EXPERIENTIAL ACTIVITY 2: Archetypes of leaders*** INSTRUCTIONS: Now, we’ll take our lists and look at the archetypes of leaders we are coming up with.
	+ An archetype is the first thing that comes to mind when you thing that comes to your mind when you think of a leader.
	+ For example: When I think of a car mechanic, I think of overalls
* REFLECTION:
	+ What is your archetype?
	+ How is your archetype different than you?
	+ Give an example of someone who has challenged your archetype
* BIG GROUP DISCUSSION: What archetypes? Who challenged you?
 | * Examples of archetypes
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| 4:15- 4:25 | **UPFRONT:** * Our conceptions of what leadership is can be limiting
* Some of you chose *positional leaders* and some chose *emergent* leaders
	+ Define both
* And in fact, as some of you already know, management and leadership are also two different things
	+ Define management and it’s outcomes
* Our fellows and students are going to challenge our leadership at times. They will have conflicts, they will disagree with you, etc…
* In those moments, we have choices (choice points)
* Because leadership is not “trait based”. Leadership is not “coercive.” And leadership is certainly not telling people what to do. People are not born leaders. Instead, we define leadership as:
* **Definition: Process by which an individual influences a group for positive change**
* A leader needs followers, and followers need a leader. But in all, you need to actively work to influence your team positively.
* So allow your conceptions and assumptions of leadership to be challenged -- you have the choice to grow, revise, and actively practice leadership every day.
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|  | **DEBRIEF AND KEY-TAKEAWAYS*** We all have archetypes of leadership based off of our experiences, preferences, biases, and societal narratives.
* The most important part is to continually those archetypes and more align them to what we believe leaders are.
* We want you to feel that you can be the leader your meant to be and should continue re-examining your definition of leadership that you’re holding yourself to
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