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# MANAGEMENT & LEADERSHIP FUNDAMENTALS

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*Dr. Jennifer R. Madden*

THE RESEARCH SUGGESTS



1. Nonprofit Management Fundamentals (7/18)

2. Fund Development Strategies (7/25)

3. Grant Writing Fundamentals (8/8)

next steps on the  
**JOURNEY**

5. Design Thinking/Human-Centered Design Fundamentals (9/19)

6. Design Thinking Techniques (10/17)

7. Strategic Planning FUNDamentals (10/24)

*Management &  
Leadership  
Fundamentals  
(TODAY!)*

*next steps on the*

# ELEVATE YOUTH CAPACITY BUILDING JOURNEY...



## “To Go” Toolbox

- *Helping People Excel*
- *Group Theory*
- *Motivation Orientation*
- *The Five Practices of Exemplary Leadership*
- *Developing Active Listening Skills*
- *Tips for Managing Volunteers*



## Management & Leadership Fundamentals

- *Leadership*
- *Emotional Intelligence*
- *Leadership vs. Management*

# AGENDA

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- A. Leadership
- B. Emotional Intelligence
- C. Leadership vs. Management
- D. “To Go” Toolbox
  - 1. Active Listening Skill Development
  - 2. Helping People Excel
  - 3. Leadership Styles
  - 4. Group Theory
  - 5. Motivation Orientation

*Chat Storm*



*Core Concept &  
Toolbox Icon*



*Recall...*

“Language enables you to  
see not to speak.”

# A

## On Leadership



# THREE AREAS OF LEADERSHIP

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- Lead Self
  - Connect your leadership story, purpose and vision
- Lead Others
  - Build buy-in, followers and other leaders
- Lead Organizations
  - Integrate knowledge of self, others and organizations for impact

# BEST

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- Take a moment to:
  - Think of a leader, boss, manager, coach, teacher... who brought out the best in you and how
- Now:
  - Write down a few reasons why or how

Note your  
reasons in  
the chat.



## WE KNOW

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- What great leadership looks like
- Great leaders:
  - Motivate and inspire
  - See our potential
  - Are mindful, compassionate, and encouraging
  - They create and maintaining **resonance**

# WORST

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- Take a moment to:
  - Think of a leader, boss, teacher, coach, manager who epitomized bad leadership causing you to shut down, underperform, or even fail
- Now:
  - Write down a few reasons why or how

**Note your  
reasons in  
the chat.**



# HOW DID YOU FEEL?

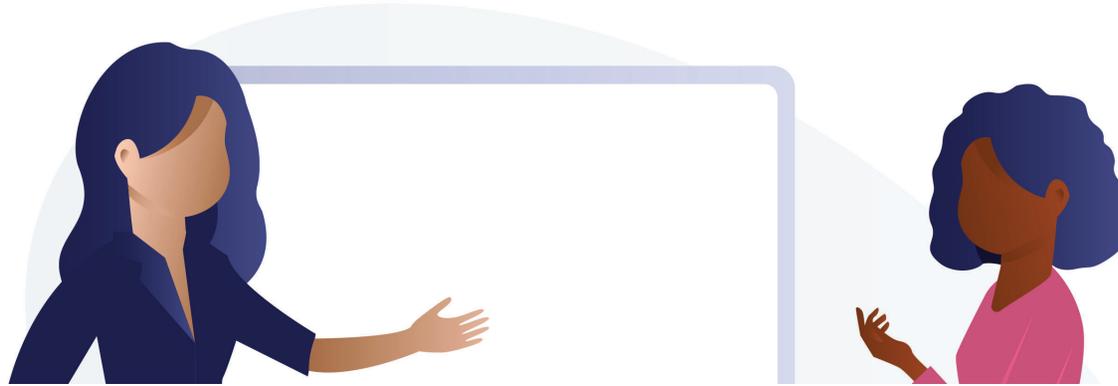
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*When you were thinking about your best and your worst boss*

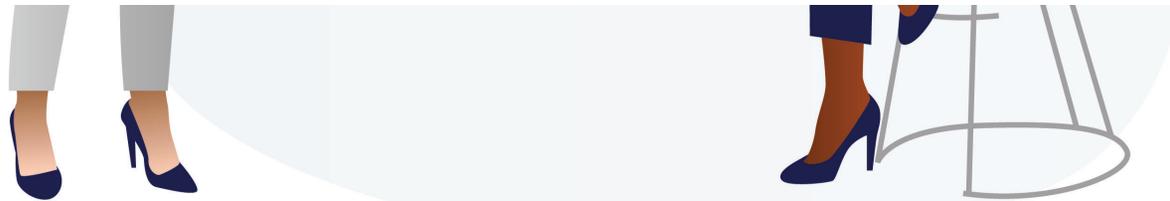
## WHAT WE ALSO KNOW

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- Emotions are contagious
  - The brain has an 'open loop' system
  - We are 'wired' to pick up subtle clues from one another
  - Resonance is Contagious... So is Dissonance



# ENGAGING THE PARASYMPATHETIC NERVOUS SYSTEM



## TWO ATTRACTORS

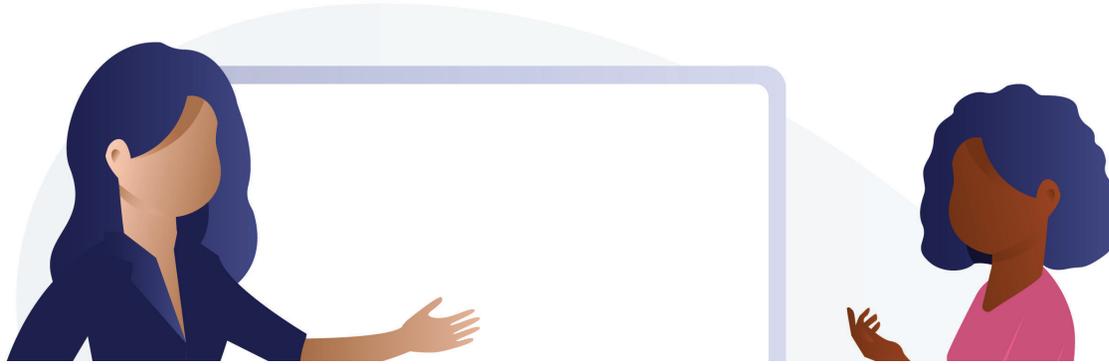
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### *Positive Emotional Attractor (PEA)*

- PSNS Arousal
- Left Prefrontal Cortex
- Ideal Self
- Strengths
- Focus on Future
- Hope
- Possibilities
- Optimism
- Learning Agenda and Goals

### *Negative Emotional Attractor (NEA)*

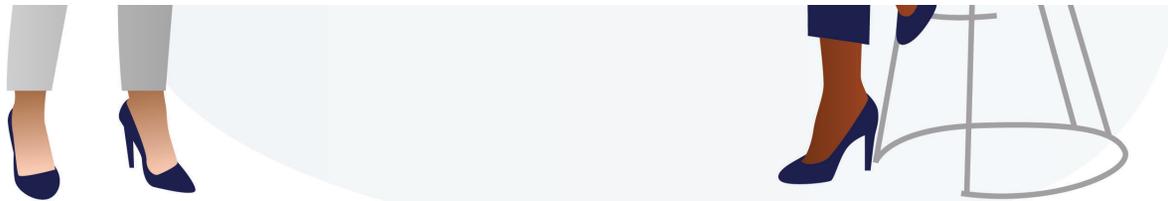
- SNS arousal
- Right Prefrontal
- Real Self / Social Self
- Gaps / Weaknesses
- Focus on Past
- Fear
- Problems
- Pessimism
- Performance Improvement Plan



# RESONANT LEADERSHIP

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Great leaders move us through our emotions



# B

Emotional  
Intelligence



“

People will forget what you said, people will forget what you did, but people will never forget how you made them feel

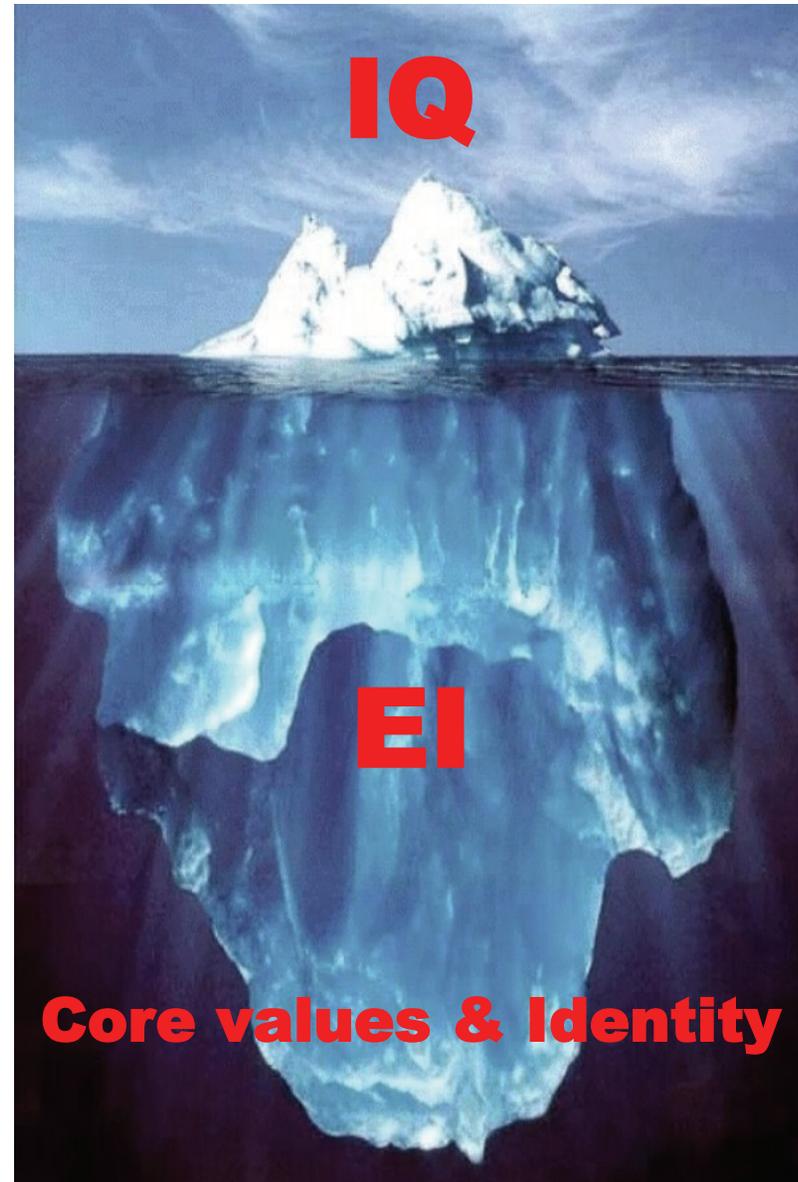
~ *Maya Angelou*

## EMOTIONAL INTELLIGENCE

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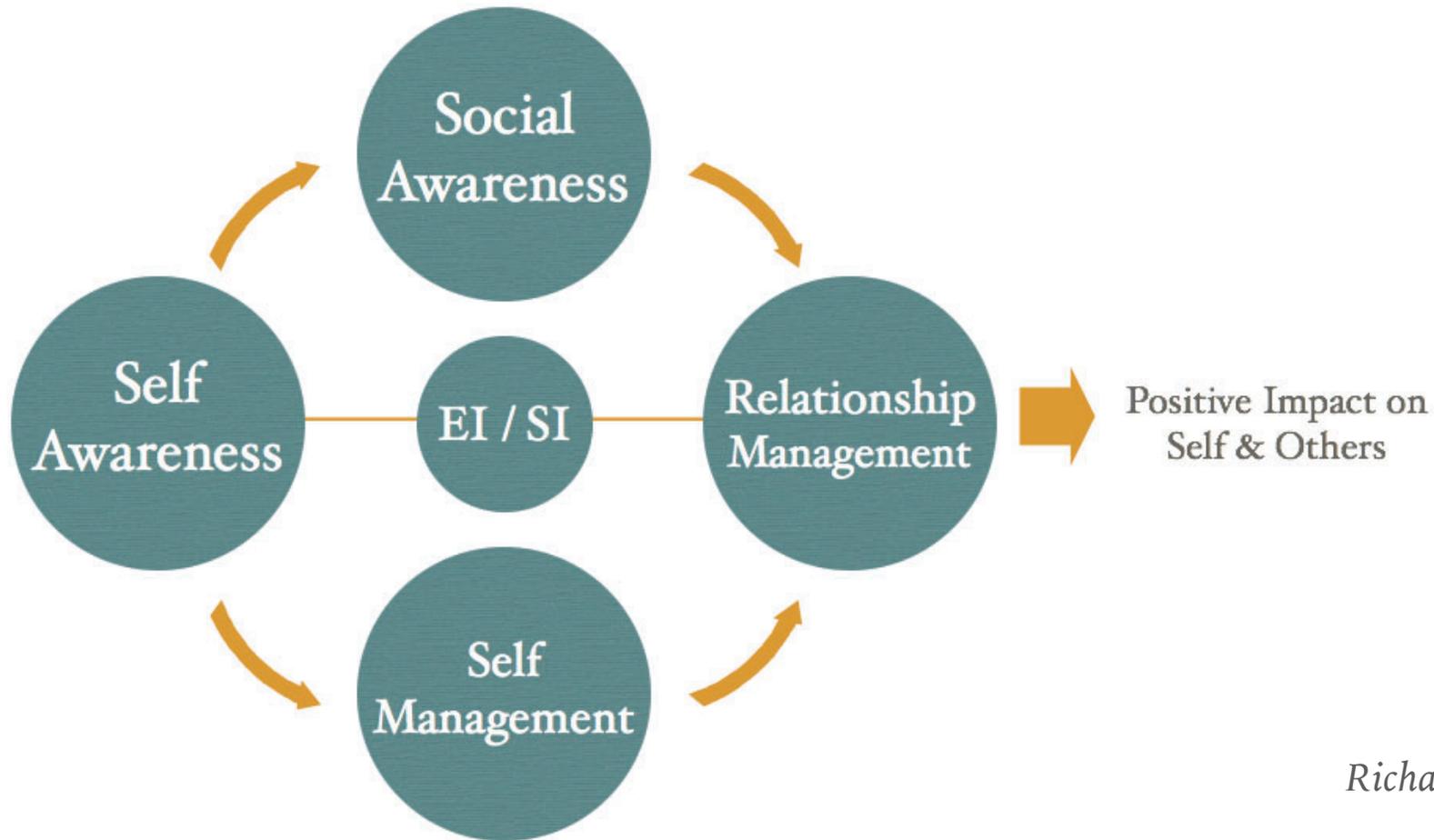
- The capacity for **recognizing** our own emotions and those of others, for **motivating** ourselves and others, and for **managing** emotions well in ourselves and in our relationships.

**IQ IS JUST  
THE TIP  
OF THE  
ICEBERG**



# GOOD LEADERSHIP BEGINS WITH EMOTIONAL & SOCIAL INTELLIGENCE

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*Richard Boyatzis, 2003*

# EMOTIONAL INTELLIGENCE

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- ▶ Emotional Competencies — These capabilities determine how we manage ourselves
  - ▶ Self Awareness
  - ▶ Self Management
- ▶ Social Competencies — These capabilities determine how we manage relationships
  - ▶ Social Awareness
  - ▶ Relationship Management

# SELF AWARENESS

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- Emotional self-awareness: Reading one's own emotions and recognizing their impact; using "gut-sense" to guide decisions
- Accurate self-assessment: Knowing one's strength and limits
- Self-confidence: Having a sound sense of one's self worth and capabilities

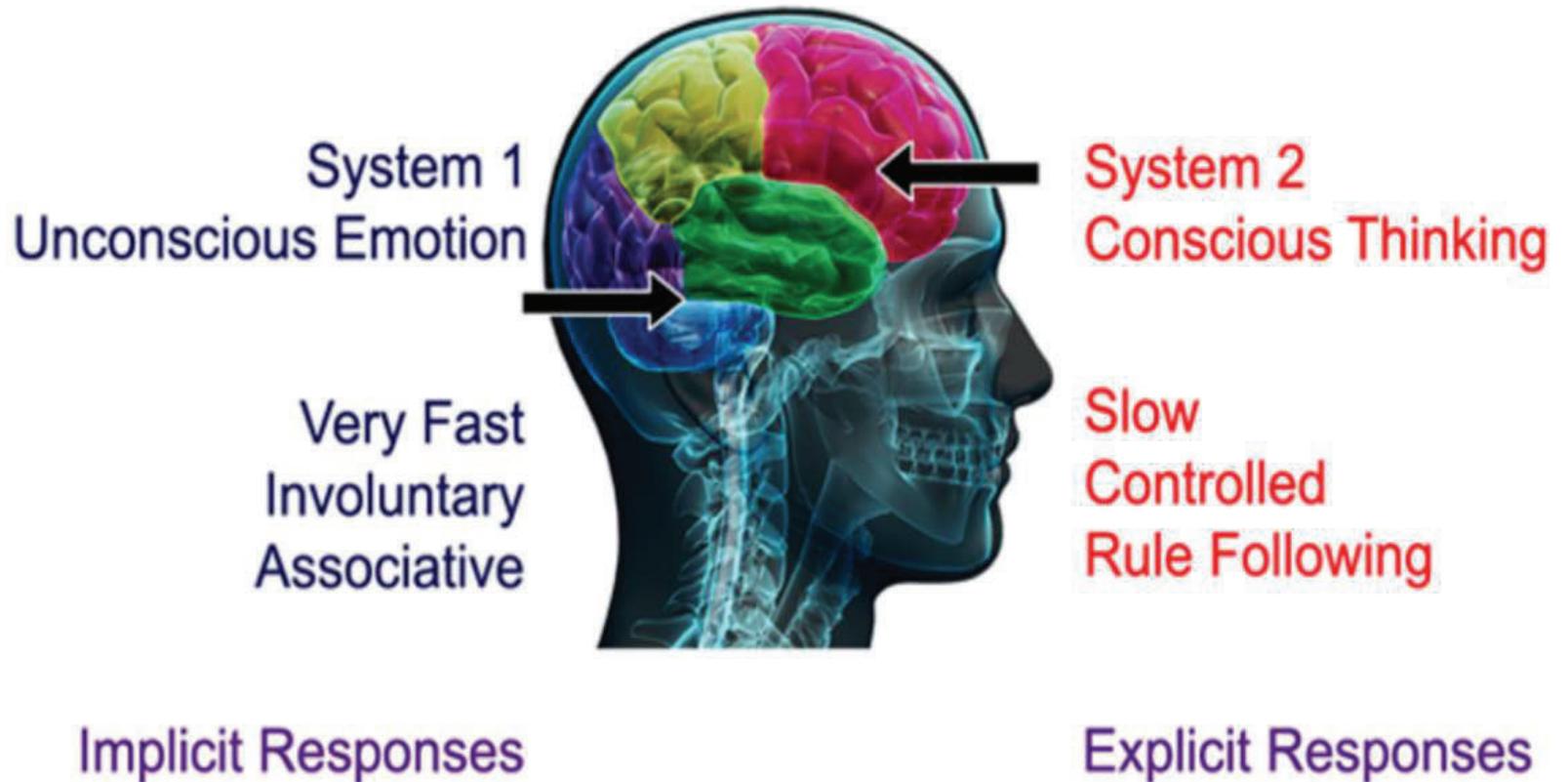
# SELF MANAGEMENT

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- Emotional self-control: Keeping disruptive emotions and impulses under control
- Transparency: Displaying honesty, integrity, and trustworthiness
- Adaptability: Demonstrating flexibility in adapting to changing situations or overcoming obstacles
- Achievement: Having the drive to improve performance to meet inner standards of excellence
- Initiative: Being ready to act and seize opportunities
- Optimism: Seeing the “up side” in events

*Learning how to pause and allow your slow brain to kick in is key to managing self and triggers.*

# Two Decision Making Routes



## SOCIAL AWARENESS

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- Empathy: Sensing others' emotions, understanding their perspectives, and taking active interest in their concerns
- Organizational awareness: Reading the currents, decision networks, and politics at the organizational level
- Service: Recognizing and meeting follower, client, or customer needs

# MASLOW'S HIERARCHY OF NEEDS



**SELF ACTUALIZATION**

Desire to become the most that one can be

**SELF ESTEEM**

Respect, status, recognition, strengths, freedom

**LOVE & BELONGING**

Friendship, intimacy, family, sense of connection

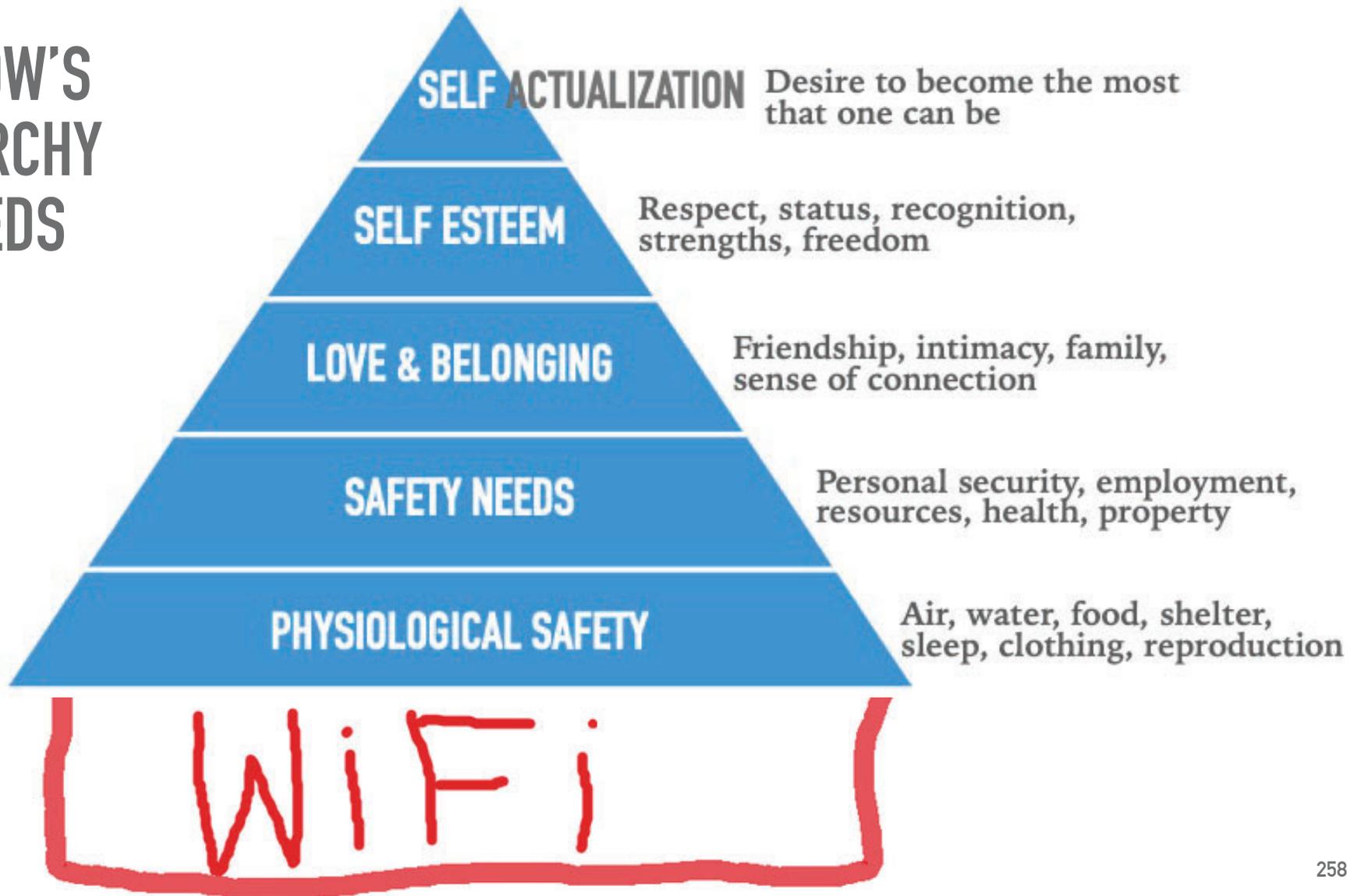
**SAFETY NEEDS**

Personal security, employment, resources, health, property

**PHYSIOLOGICAL SAFETY**

Air, water, food, shelter, sleep, clothing, reproduction

# MASLOW'S HIERARCHY OF NEEDS



# RELATIONSHIP MANAGEMENT

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- Inspirational leadership: Guiding and motivating with a compelling vision
- Influence: Using a range of tactics for persuasion
- Developing others: Bolstering others' abilities through feedback and guidance
- Change catalyst: Initiating, managing, and leading in a new direction
- Conflict management: Resolving disagreements
- Building Bonds: Cultivating and maintaining a web of relationships
- Teamwork and collaboration: Fostering cooperation and team building



# INTENTIONAL CHANGE THEORY

# SELF-DISCREPANCY THEORY

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*E. Tory Higgins*

- Who you are, how you appear to others; Multiple selves, multiple roles
- The Ideal Self — the person we want to be
- The Real Self — our actual self
- The Ought Self — our understanding of what others want us to be; what we “ought” to be and do

## SELF-DISCREPANCY THEORY

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- ▶ When our Ideal Self does not align with our Real Self, we typically feel disappointed, sad or despondent
- ▶ When our Ought Self does not match our Real Self, we typically feel agitated, guilty, distressed, and anxious
- ▶ Finding our passion and dreams helps to break away from our Ought Self

# Toni Morrison



# The Bluest Eye



# THE IDEAL SELF

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*Catching your dreams and engaging your passion*

- The power of positive imaging and visioning
- Thinking in the Left Prefrontal Cortex — PEA!!
- But we often skip over formulating the Ideal Self image in development or education and under develop our own ideals and dreams
- We cannot inspire this passion in others without engaging it ourselves

## TWO ATTRACTORS

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### *Positive Emotional Attractor (PEA)*

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- Focus on Future
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- Possibilities
- Optimism
- Learning Agenda and Goals

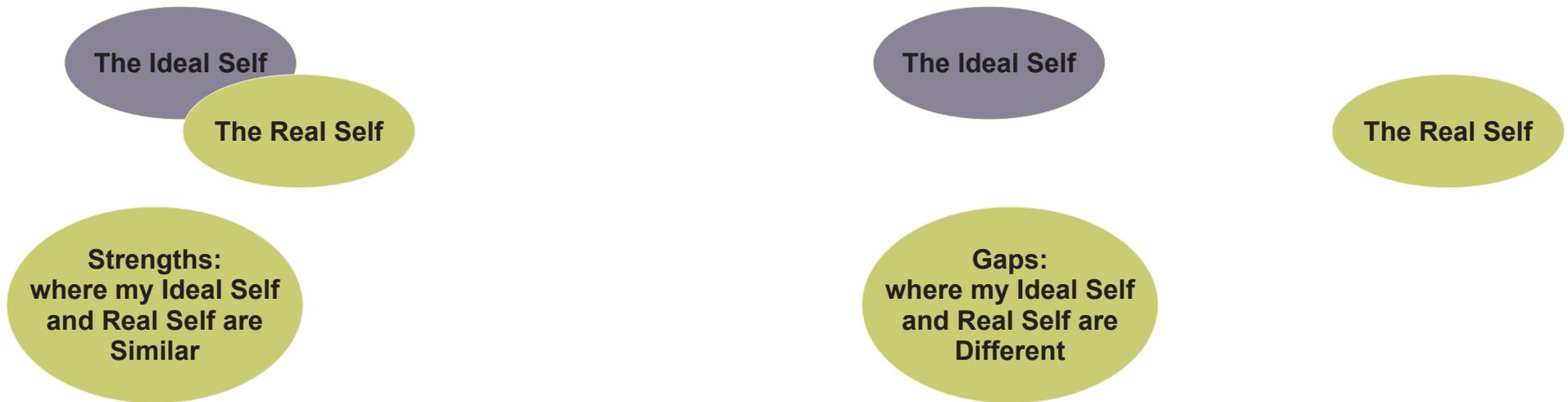
### *Negative Emotional Attractor (NEA)*

- SNS arousal
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- Real Self / Social Self
- Gaps / Weaknesses
- Focus on Past
- Fear
- Problems
- Pessimism
- Performance Improvement Plan

# THE MOTIVATION TO CHANGE

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- Finding your passion and dreams
- Breaking from the Ought Self

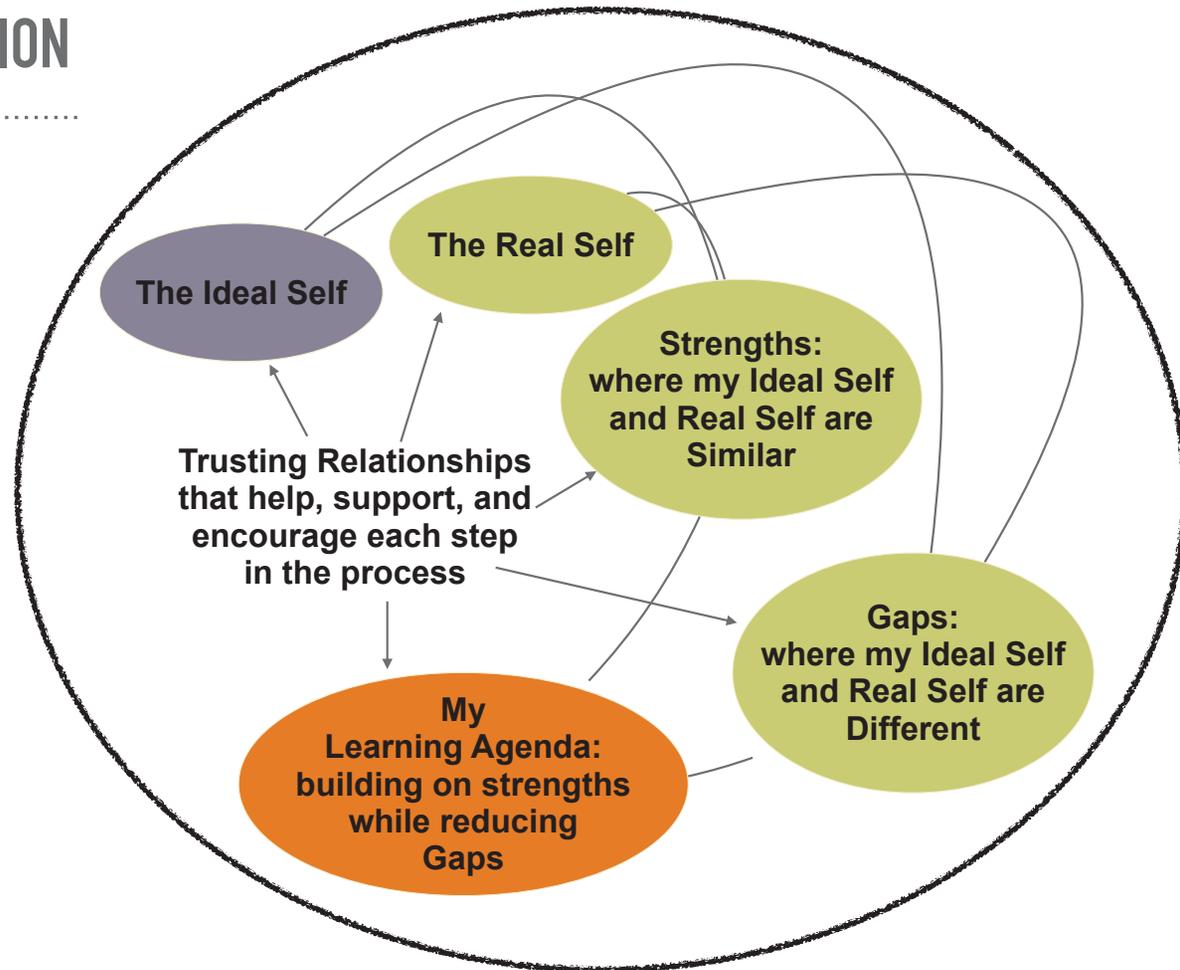


Trusting Relationships help,  
support, and encourage

## CREATING MINDFULNESS AND ATTENTION

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- Creating a Learning Agenda
- Build on Strengths
- Fit into Life & Work



*Richard E. Boyatzis, 2003*



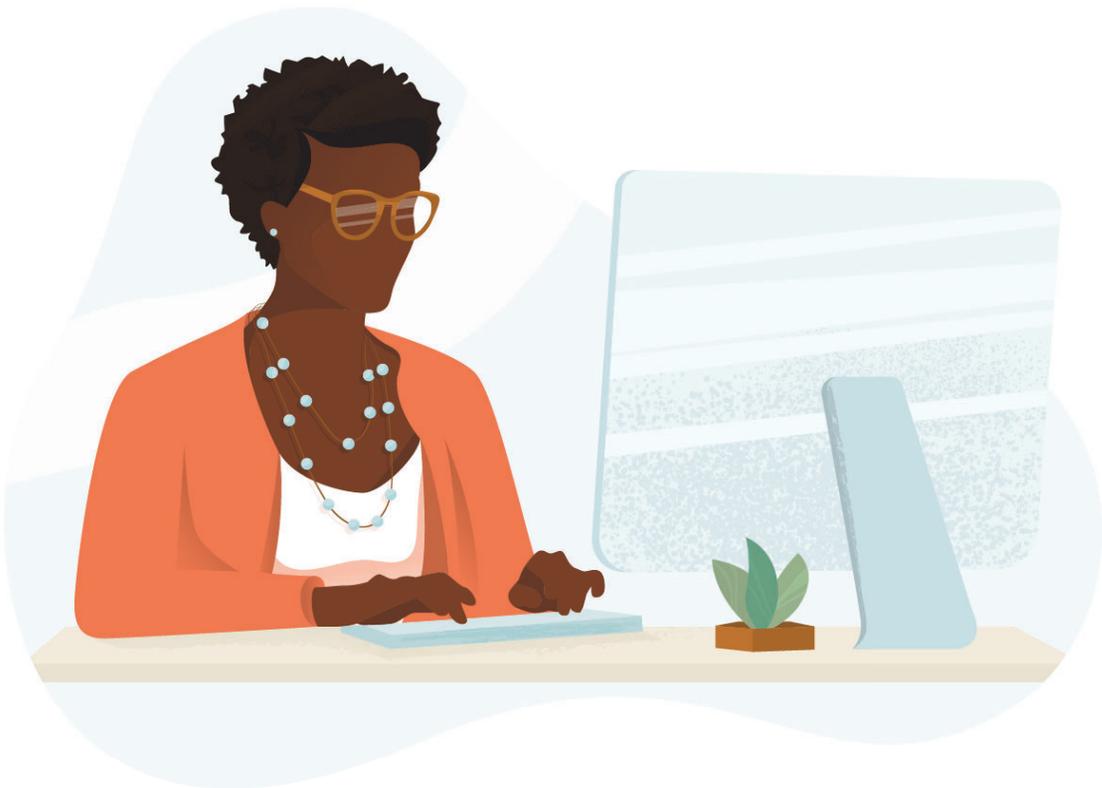
**IDEAL  
SELF**

## 27 THINGS

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- List 27 things that you would like to experience, try, or accomplish in your lifetime that you have not yet begun or completed
  - Write each on a separate post-it note
  - Think back to childhood dreams
  - Let yourself imagine freely
  - Work fast and don't censor
  - Write what comes up without judgment





# 27 THINGS

*Put 5 in the chat!*



# C

## Leadership vs. Management



# LEADERSHIP VS MANAGEMENT

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## *Leader*

- Concerned with vision and judgment
- Active and visionary about the future
- Seek out opportunities and take risks
- Passionate and likely to cause turbulence
- See themselves as agents of change

## *Manager*

- Concerned with mastering routines
- Adopt impersonal or passive attitudes toward goals
- Excel in problem-solving and work design
- Work with people in carefully controlled ways
- See themselves as conservators or regulators

# DIFFERENCES

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	<b>LEADERS</b>	<b>MANAGERS</b>
<b>ROLE</b>	Set organizational course	Set structure & process
<b>ORIENTATION</b>	Relationships and people	Structure and task
<b>FOCUS</b>	Future	Present
<b>EMPHASIS</b>	What is the organizational purpose?	How can we make it happen?

## MANAGER VS. LEADER

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- Manager are adept at coping with complexity:
  - good management creates order and consistency
  - engage in controlling and problem solving, monitoring results
- Good Leaders are adept at coping with change:
  - can tolerate chaos and lack of structure
  - willing to delay closure in order to understand issues more fully

## REFLECTION

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- Need to develop abilities to do BOTH LEAD and MANAGE
- Just need to know the difference between the two and what a situation calls for

# LEADERSHIP STYLES

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*What is your primary style?*



# GOLEMAN'S SIX STYLES



*What is your go-to leadership style?*

Note your response in the chat.

The Style	Modus Operandi	In a Phrase	Underlying EQ Competencies	When style work best	Impact on Climate
<b>Coercive</b>	Demands immediate compliance	"Do what I tell you"	Drive to achieve, initiate, self-control	In crisis, to kick start a turnaround, or with problem employees	Negative
<b>Authoritative</b>	Mobilize people towards vision	"Come with me"	Self-confidence, Empathy, Change catalyst	When changes require a new vision or a clear direction is needed	Positive
<b>Affiliative</b>	Creates harmony and builds emotional bonds	"People come first"	Empathy, Building relationships, Communication	To heal rifts in a team or to motivate people during stressful circumstances	Positive
<b>Democratic</b>	Forges consensus through participation	"What do you think?"	Collaboration, Team leadership, Communication	To build buy-in or consensus, or get input from valuable employees	Positive
<b>Pacesetting</b>	Sets high standards of performance	"Do as I do, now"	Conscientiousness, Drive to achieve, Initiative	To get quick results from a highly motivated and competent team	Negative
<b>Coaching</b>	Develops people for the future	"Try this"	Develop others, Empathy, Self-awareness	To help an employee improve performance or develop long-term strengths	Positive

*Know your*

**PRIMARY LEADERSHIP STYLE...**

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*and other leadership styles available for use as the need arises*

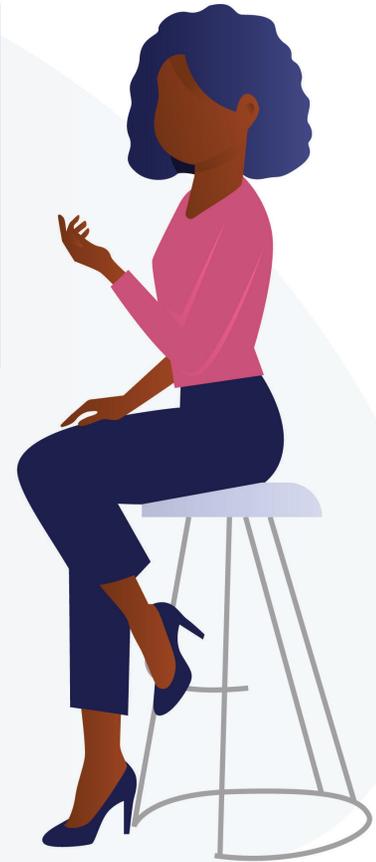
# TOP 10 LEADERSHIP QUALITIES OF GREAT MANAGERS

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- Honesty
- Communication Skills
- Decisiveness
- Confidence
- Responsibility
- Empathy
- Focus
- Creativity
- Optimism
- Commitment

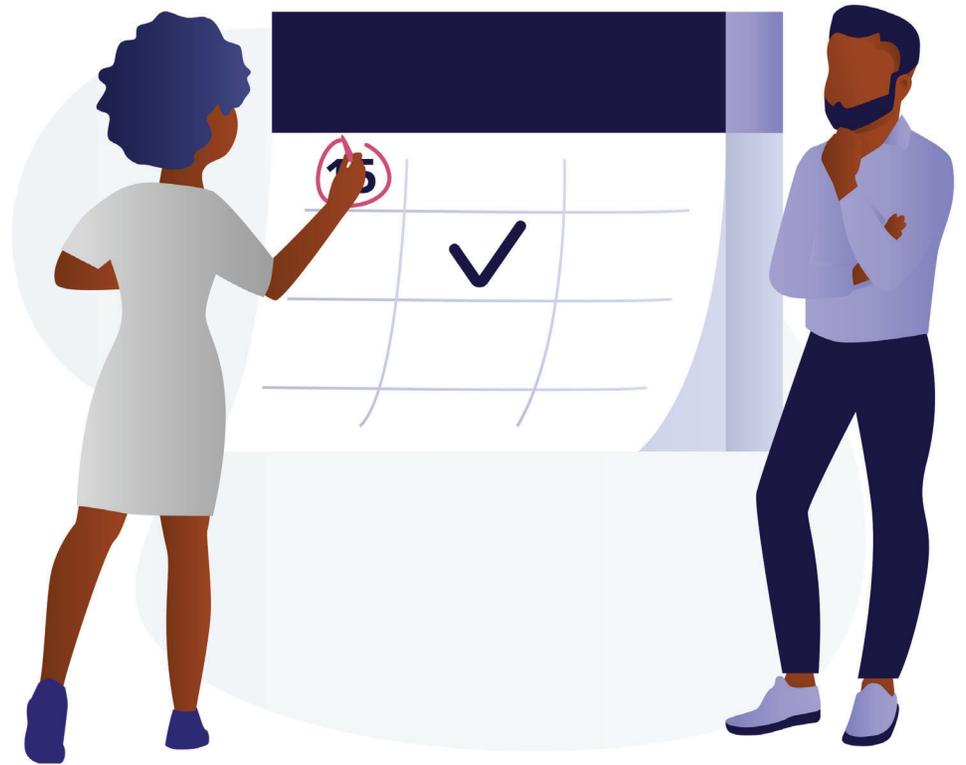
D

*toolbox*



HELP  
PEOPLE  
EXCEL

*toolbox*



## INSIGHT FROM RESEARCH

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- Telling people what we think of their performance doesn't help them thrive and excel
- Telling people how we think they should improve actually hinders learning
- Your brain responds to critical feedback as a threat and narrows its activity. Criticism produces a strong negative emotion.
- Focusing people on their shortcomings or gaps doesn't enable learning. It impairs it.

*<https://hbr.org/2019/03/the-feedback-fallacy>*

## TIP #1: LOOK FOR OUTCOMES (CALL IT OUT)

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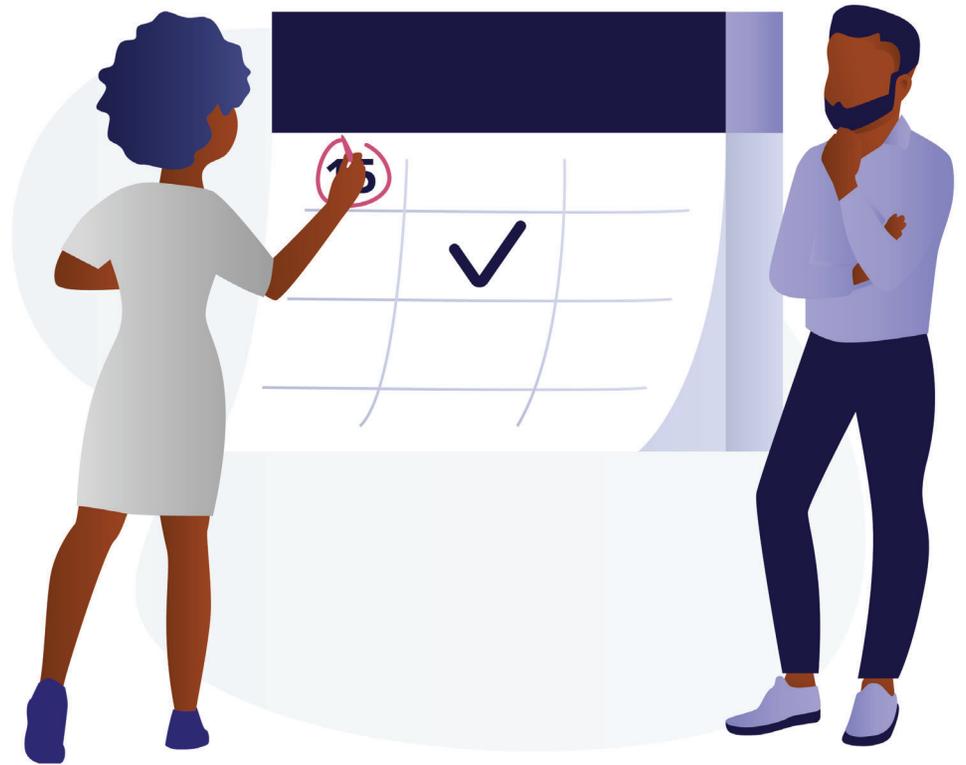
- Whenever you see one of your people do something that worked for you, that was outstanding, stop for a minute and highlight it
  - This helps your team member recognize what excellence looks like
  - When you see it say, “That! Yes, that!”
  - This approach offers the person a chance to gain insight
  - You are highlighting a pattern that is already there within the person so that they can recognize it, anchor it, re-create it, and refine it. This is learning!!

## TIP #2: SHARE YOUR PERSONAL REACTIONS

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- Describe what you experienced when the moment of excellence caught your attention.
- There is nothing more believable than sharing what you saw and how it made you feel. To share your truth, use phrases such as:
  - “This is how that came across for me”
  - “This is what that made me think”
  - “Did you see what you did there?”
- When you relay this specific detail, you are not judging, or rating, or fixing. You are simply reflecting on the unique impact the person just made in the world, as seen through your eyes.
- Because it isn’t a judgment or a rating it is at once more humble and more powerful

**TIP #3:  
TRY PHRASING  
THINGS  
DIFFERENTLY**



**INSTEAD OF:**

*Can I give you some feedback?*

**TRY:**

*Here's my reaction.*

## INSTEAD OF:

*Good job!*

## TRY:

*Here are three things that really worked for me. What was going through your mind when you did them?*

**INSTEAD OF:**

*Here's what you should do.*

**TRY:**

*Here's what I would do.*

## INSTEAD OF:

*Here's where you need to improve.*

## TRY:

*Here's what worked best for me, and here's why.*

## INSTEAD OF:

*That didn't really work.*

## TRY:

*When you did "x", I felt "y" or  
I didn't get that.*

## INSTEAD OF:

*You need to improve your communication skills.*

## TRY:

*Here's exactly where you started to lose me.*

## INSTEAD OF:

*You need to be more responsive.*

## TRY:

*When I don't hear from you, I worry that we're not on the same page.*

## INSTEAD OF:

*You need to be more responsive.*

## TRY:

*When I don't hear from you, I worry that we're not on the same page.*

**INSTEAD OF:**

*You lack strategic thinking.*

**TRY:**

*I'm struggling to understand  
your plan.*

## INSTEAD OF:

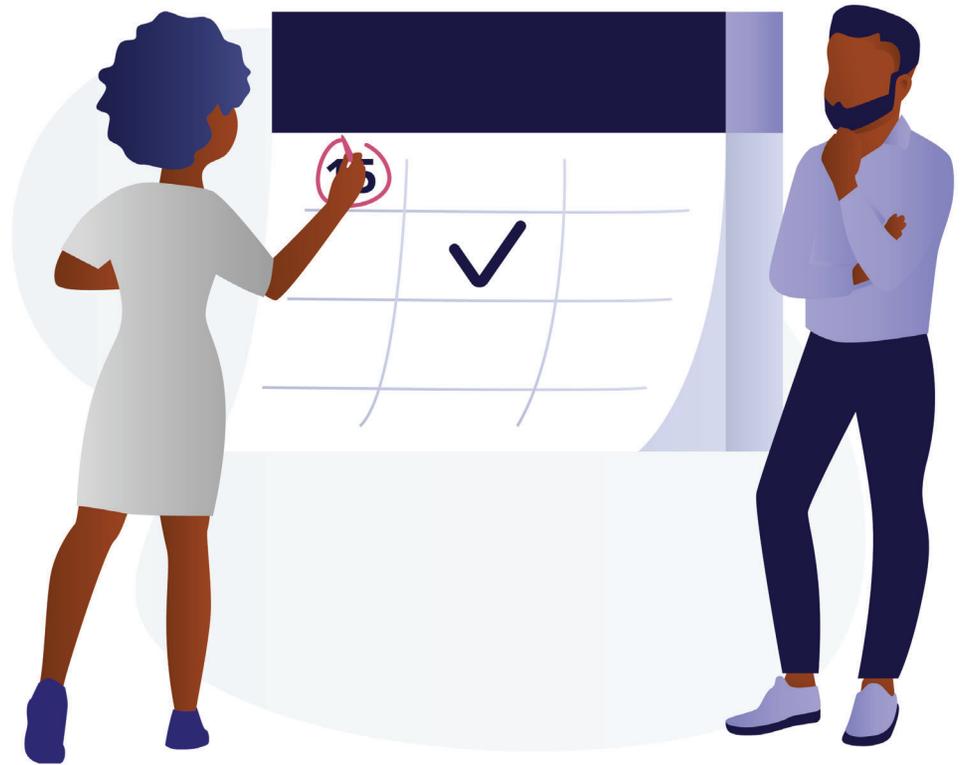
*You should do “x” [in response to a request for advice].*

## TRY:

*What do you feel you’re struggling with, and what have you done in the past that’s worked in a similar situation?*

# GROUP THEORY

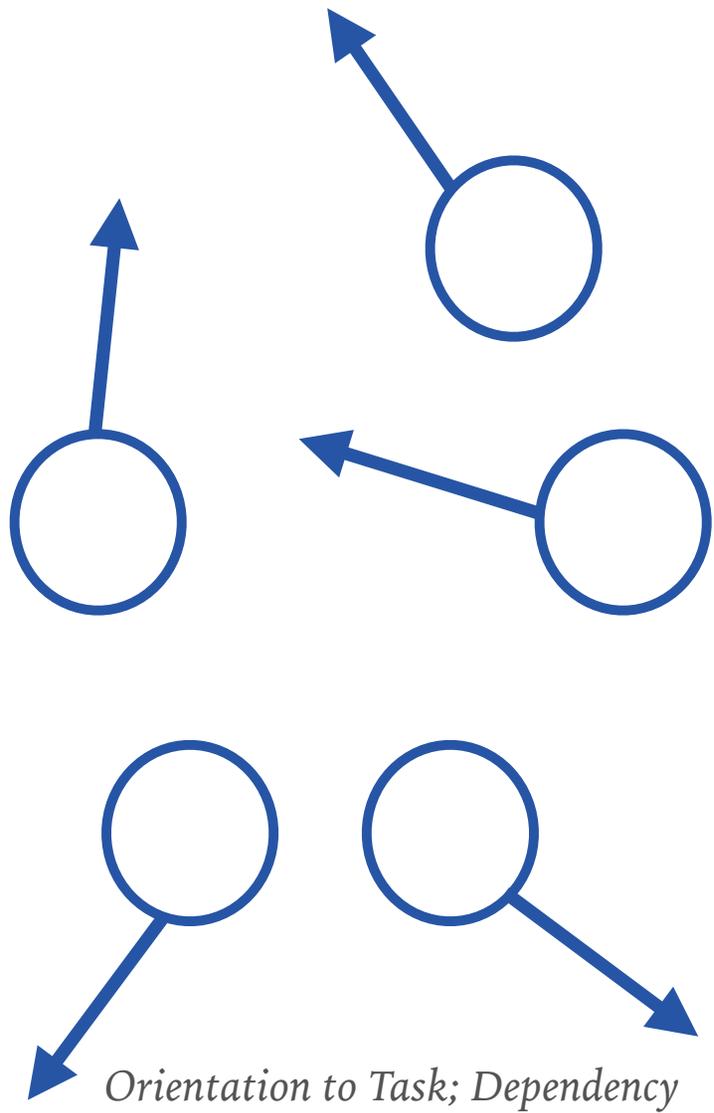
*toolbox*



# STAGES OF GROUP DEVELOPMENT

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- Forming Stage — First stage of group joining together
- Storming Stage — This second stage of group development is defined by intragroup conflict
- Norming Stage — This third stage is characterized by close relationships and cohesiveness of group
- Performing Stage — At this stage a fully functional group



## STAGE 1: FORMING

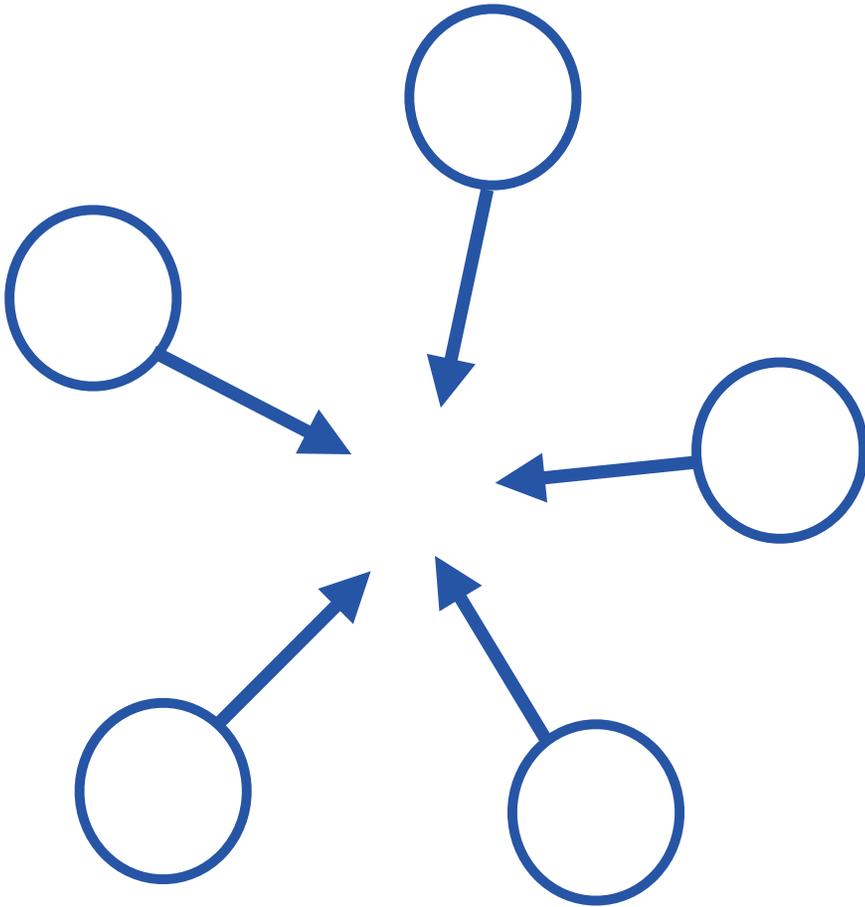
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- Confusion
- Uncertainty
- Assessing the Situation
- Testing Ground Rules
- Feeling out Others
- Defining Goals
- Getting Acquainted
- Establishing Rules

## STAGE 2: STORMING

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- Disagreement over Priorities
- Struggle for Leadership
- Tension
- Hostility
- Clique Formation

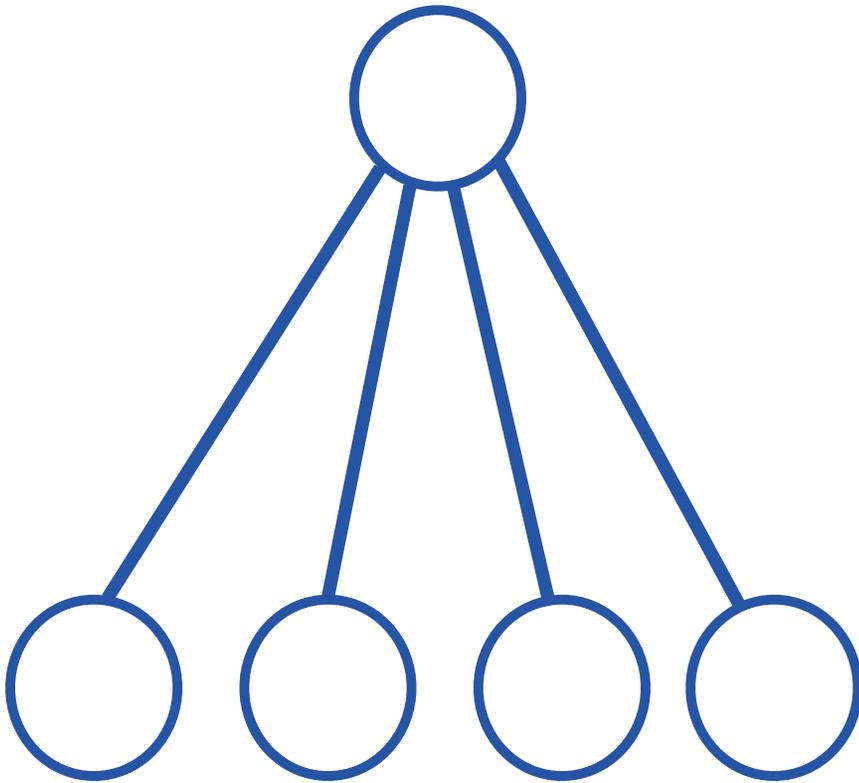


*Organization for Task; Conflict*

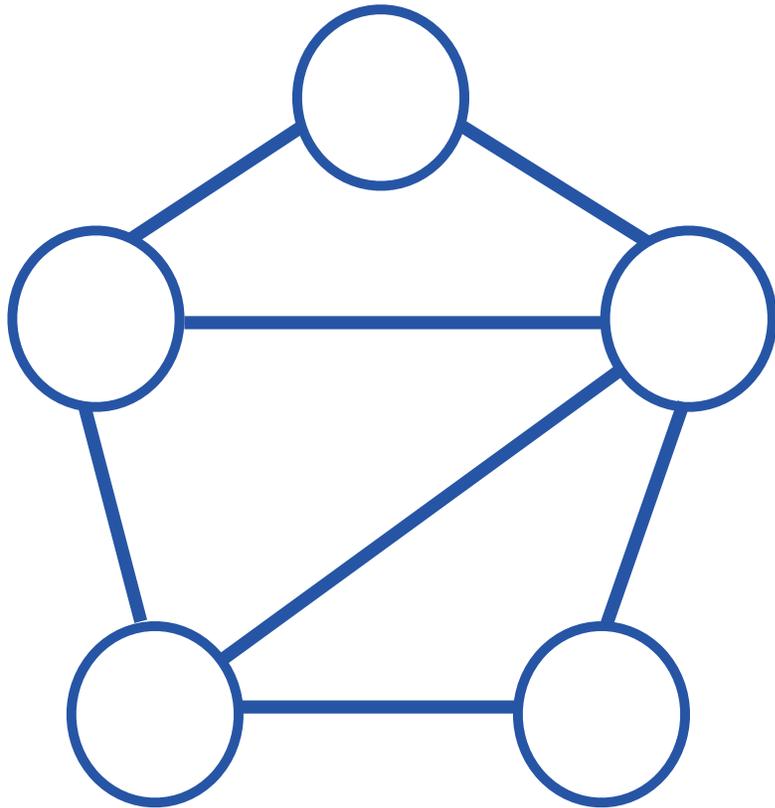
## STAGE 3: NORMING

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- Consensus
- Leadership Accepted
- Trust Established
- Standards Set
- New Stable Roles



*Increased Data Flow: Achieve Task; Cohesion*

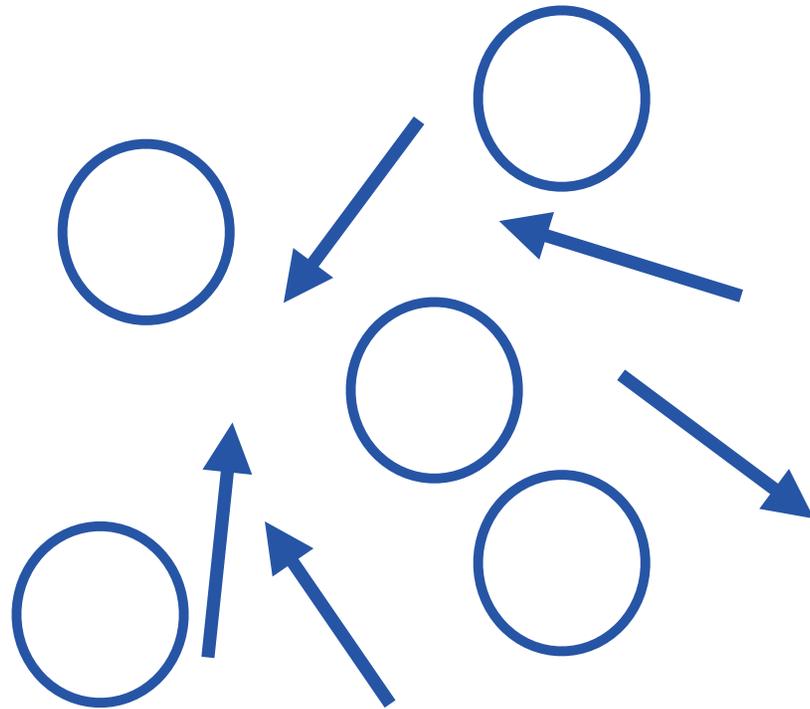


*Solution Finding; Interdependence*

## STAGE 4: PERFORMING

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- Successful Performance
- Flexible, Task Roles
- Openness
- Helpfulness
- Delusion, Disillusion into Acceptance



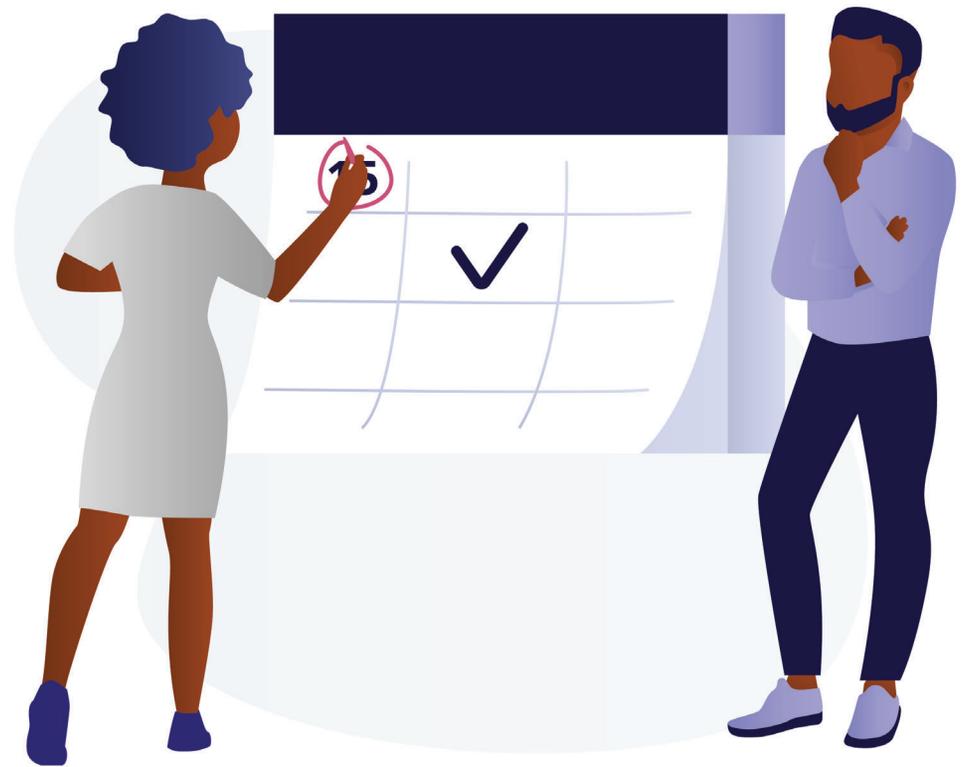
## STAGE 5: ADJOURNING

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- Disengagement
- Anxiety about Separation & Ending
- Positive Feeling towards Leader
- Sadness
- Self-Evaluation

# MOTIVATION ORIENTATION

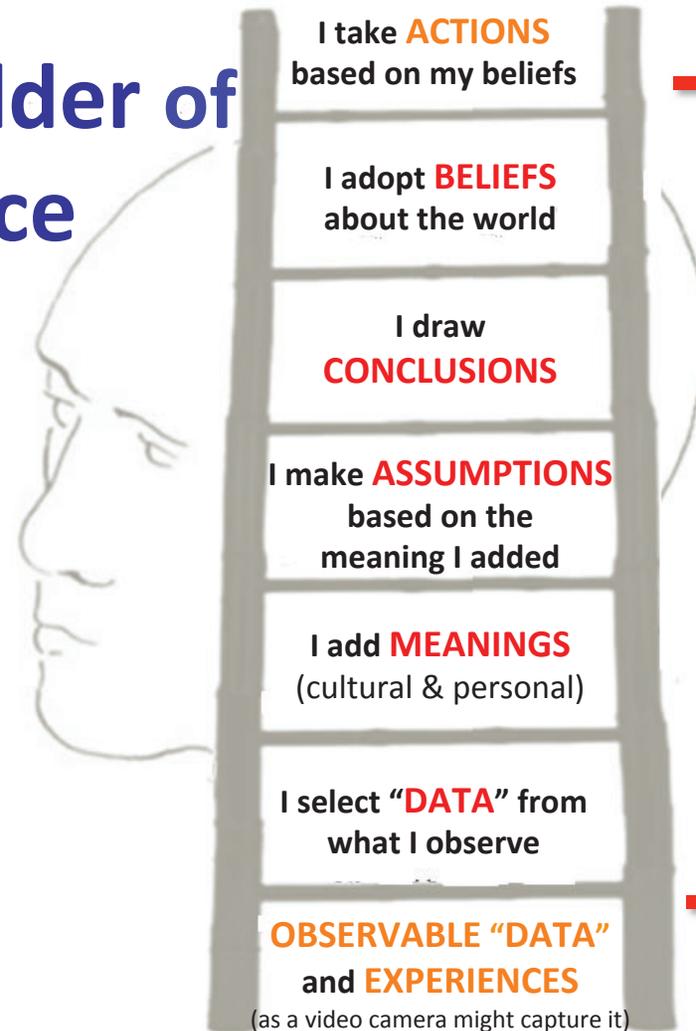
*toolbox*



# MENTAL MODELS

- First... a word on mental models

## The Ladder of Inference



**"THE BOX"**  
Schema  
Habit of Mind  
Mental Model  
Mindset  
Mental Map  
Hardwiring  
Frame  
Paradigm

*"Our prior experiences with the world inform what we can perceive"*  
-Lisa Feldman

Source:  
*The Fifth Discipline*  
(Peter Senge)



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# MOTIVATION ORIENTATION

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*Using motivation to influence  
and inspire*



## DIAGNOSING PERFORMANCE CHALLENGES: IS IT ABILITY OR MOTIVATION?

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- How difficult are the tasks?
- How capable is the individual?
- How hard is individual trying to succeed at the job?
- How much improvement is individual making?

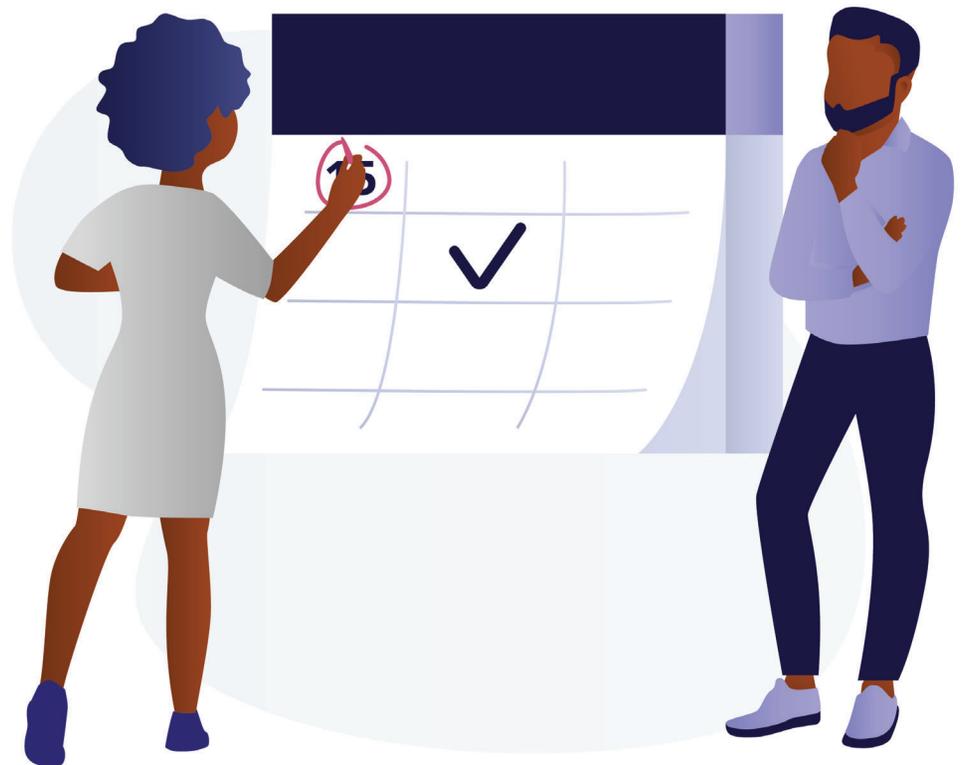
# FORMULA FOR PERFORMANCE

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- Performance = Ability x Motivation (Effort)
- Ability = Aptitude x Training x Resources
- Motivation = Desire x Commitment

# THE FIVE PRACTICES OF EXEMPLARY LEADERSHIP

*toolbox*



# THE FIVE PRACTICES OF EXEMPLARY LEADERSHIP

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- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart

## MODEL THE WAY

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- Leaders establish principles concerning the way people (constituents, peers, colleagues, and customers alike) should be treated and the way goals should be pursued.
- They create standards of excellence and then set an example for others to follow because the prospect of complex change can overwhelm people and stifle action.
- They set interim goals so that people can achieve small wins as they work toward larger objectives.
- They unravel bureaucracy when it impedes action; they put up signposts when people are unsure of where to go or how to get there; and they create opportunities for victory.

## INSPIRE A SHARED VISION

---

- Leaders passionately believe that they can make a difference.
- They envision the future, creating an ideal and unique image of what the organization can become.
- Through their magnetism and quiet persuasion, leaders enlist others in their dreams.
- They breathe life into their visions and get people to see exciting possibilities for the future.

## CHALLENGE THE PROCESS

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- Leaders search for opportunities to change the status quo.
- They look for innovative ways to improve the organization. In doing so, they experiment and take risks.
- Because leaders know that risk taking involves mistakes and failures, they accept the inevitable disappointments as learning opportunities.

## ENABLE OTHERS TO ACT

---

- Leaders foster collaboration and build spirited teams.
- They actively involve others.
- Leaders understand that mutual respect is what sustains extraordinary efforts; they strive to create an atmosphere of trust and human dignity.
- They strengthen others, making each person feel capable and powerful.

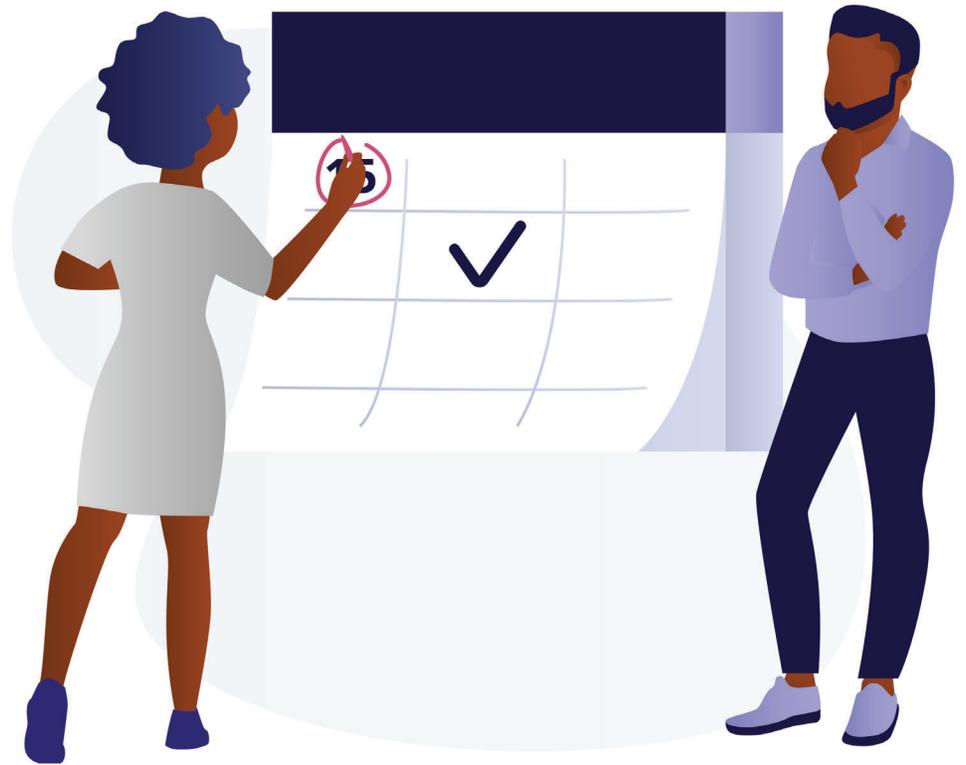
## ENCOURAGE THE HEART

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- Accomplishing extraordinary things in organizations is hard work. To keep hope and determination alive, leaders recognize contributions that individuals make.
- In every winning team, the members need to share in the rewards of their efforts, so leaders celebrate accomplishments.
- They make people feel like heroes.

# DEVELOP YOUR ACTIVE LISTENING SKILLS

*toolbox*



# ACTIVE LISTENING

---

- What it is...
  - Tuning in and connecting
  - The ability to be with a person in their world by attempting to experience what they are feeling (i.e., empathy and authentic encounter)
  - Being sensitive to the emphasis of their words by attempting to understand and interpret what is being said
- What it is NOT...
  - A tape recorder
  - Listening and simply repeating the person's words back to them

## ACTIVE LISTENING

---

- Pay close attention to make sure you hear the message correctly
- Accurate understanding of the speaker's message
- Ask questions, don't jump to conclusions
- Let the speaker know that you have heard them

## ACTIVE LISTENING SKILLS: RESPONDING

---

- Putting it all together
- Listening for the integrated narrative and context
- Give the speaker non-threatening verbal responses such as “Uh huh” and “Hm-mm” when appropriate.
- Check your tone for sincerity
- Give the speaker non-verbal responses such as an encouraging nod and non-judging facial expressions
- Identify key messages and feelings

## ACTIVE LISTENING SKILLS: REFLECTING

---

- Reflecting back to the speaker any feelings, experiences or content that has been heard or perceived through clues.
- Reflecting feelings: “It sounds like that experience made you feel angry. Is that true?”
- Reflecting facts: “I hear you when you said you were frustrated with the bank person who was being rude to you”

## ACTIVE LISTENING SKILLS: RESTATING/ PARAPHRASING

---

- To do this, restate some of the speaker's key points in your own (but fewer) words
- “What I hear you saying is...”
- “Let me see if I understood you...”
- This lets speaker know that he/she has been heard
- This allows the speaker the opportunity to correct any misunderstanding or misinterpretation you might have

## ACTIVE LISTENING SKILLS: CLARIFYING

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- Ask questions in a supportive manner to make sure that you understand what is being said
- Don't assume! If you didn't understand a meaning of something, ask a clarifying question
- "Do you mean....?" or "Did I understand that you....?"
- Gather more facts and details
- "What happened before this took place?"
- Encourage elaboration
- "What happened next?"
- Encourage discovery
- "What do you feel are your options at this point?"

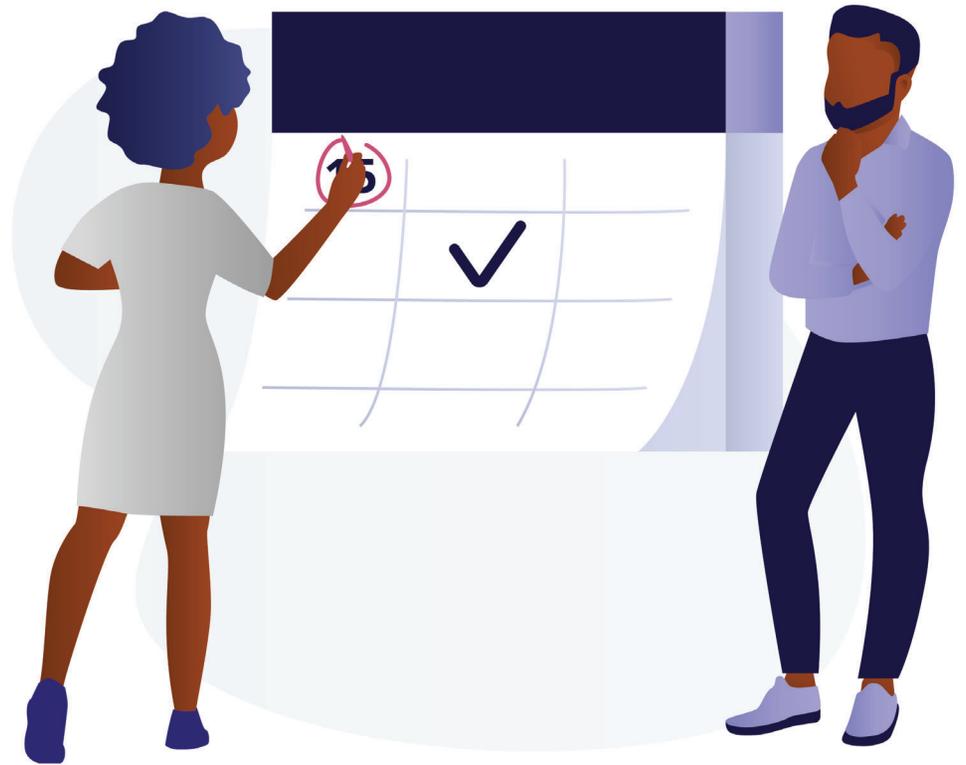
## ACTIVE LISTENING SKILLS: SUMMARIZING

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- Summarizing: Share your perception of what the speaker's experience was. Bring together the speaker's feelings and experiences
- “As I've been listening I get a sense that this was \_\_\_\_\_ for you. Is that correct?”
- “What you've just told me must have been \_\_\_\_\_ for you. Thanks for trusting me to share your experience with you.”

# MANAGING VOLUNTEERS

*toolbox*



## TYPES OF VOLUNTEERS

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- Spot — Casual and not repeated
- Episodic — Time to time
- Regular — Makes a regular commitment
- Marginal — Encouraged or mandated
- Virtual — Participates electronically
- Vacation — Travel projects

## WHY PEOPLE VOLUNTEER

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- Motivated by mission
- Desire to advance a cause
- Desire to repay for some benefit received
- Altruistic reasons
- Benefits received

# VOLUNTEER PROGRAM BEST PRACTICES

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- Assess the need of volunteers
- Determine structure of volunteer programs
- Develop volunteer job descriptions
- Develop formal volunteer policies
- Provide resources to managing volunteers
- Recruit and hire volunteers as employees
- Provide orientation and training
- Set clear goals
- Evaluate performance
- Recognize achievement



*Next in the Capacity Building Training Series*

*Tuesdays 10:00 AM to Noon*

*September 19th — Design Thinking/Human-Centered Design Fundamentals*

*October 17th — Design Thinking Techniques*

*October 24th — Strategic Planning FUNdamentals*



*Thank You!*  
***Dr. Jennifer R. Madden***

