

THE  
EMERGING  
LEADERS  
PLAYBOOK

Third Plateau  
Social Impact Strategies  
and  
Beth Kanter

THE  
EMERGING  
LEADERS  
PLAYBOOK



THIRDPLATEAU

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# INTRODUCTION

The social sector is experiencing unprecedented growth and increasing competition. Innovation, collaboration, and the ability to network (both online and offline) have become essential skills for leaders in today's social impact organizations. Success is becoming increasingly dependent on the ability for organizations to connect with their key stakeholders, create new, high-quality solutions, and show a willingness to adapt.

In this new era, leaders find themselves in a challenging situation: how do you create and maintain collaborative, innovative organizations that are positioned to drive transformative social change? For social impact organizations, collaboration must go beyond the office walls. Transformative leadership requires engaging with the entire spectrum of stakeholders from community members and other mission-aligned organizations, to businesses and policy makers.

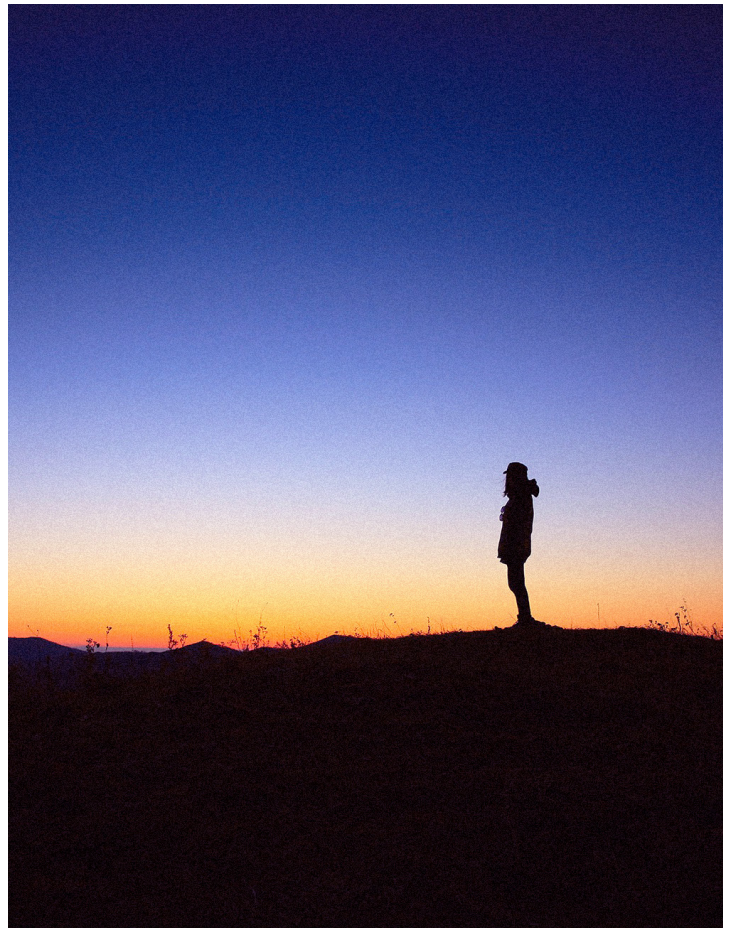


# LEADERSHIP REDEFINED

**I**N contrast to generations that came before them, today's emerging leaders have a more egalitarian view of leadership - they don't consider individuals leaders simply based on title alone. Today, leaders must be skilled collaborators, adept at bringing diverse individuals together and facilitating teamwork. The hierarchical structures that once dominated organizational culture are becoming less prevalent. Emerging leaders are placing greater value on being industry influencers, and having organizational impact and are less focused on climbing the corporate ladder or achieving the next title or promotion. Emerging leaders are still hungry for leadership opportunity, it just looks different. Today, more and more individuals are coming together to lead and co-create programs and initiatives at all levels of an organization.

For emerging leaders, this type of environment requires, arguably, a more complex set of leadership skills. For organizational leaders, it is equally challenging to create opportunities and a culture that develops and supports a new wave of leaders.

While flatter organizational structures may be more conducive to creative, innovative thinking and solutions, there remains a need for clear leadership and designated decision-makers. But are today's leaders ready to play that role? And moreover, are today's managers ready to let them?



A person is standing on a rocky cliff overlooking a vast, deep blue ocean under a clear sky. The text is overlaid on the image in a white, sans-serif font.

EMERGING  
LEADERS  
ARE STILL  
HUNGRY FOR  
LEADERSHIP  
OPPORTUNITY,  
IT JUST LOOKS  
DIFFERENT.

# IS YOUR ORGANIZATION READY?

**As** the next wave of Baby Boomer nonprofit leaders begin to retire, they are clearing a path for a new era of leadership. While some organizations have started to prepare for this transition, many have yet to invest in developing the leadership skills of their younger staff members. The reality is that by 2025, 75 percent of the workforce will be comprised of Millennials. As such, organizations are wrestling with the most effective ways to provide leadership training to this cohort, while also leveraging the values, approaches, and expectations these younger employees bring to their institutions.

This toolkit is designed to help your organization understand how to navigate the complex nature of developing an effective leadership pipeline.

“BY 2025,  
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MILLENNIALS.”

# THE PLAYBOOK

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Some leadership skills are timeless, while others evolve with the changing marketplace. We reviewed the foundational works on effective leadership, as well as the most current findings, and pulled out the very best. The result - a comprehensive guide for emerging leaders and their supervisors to help make sense of the changing nature of leadership. The Playbook provides practical tools grounded in research, accompanied by systems of support to guide reflection and growth and organizational best practices. The resources included are intended to help enrich and expand upon your leadership coaching in order to further your organization's approach to leadership development.

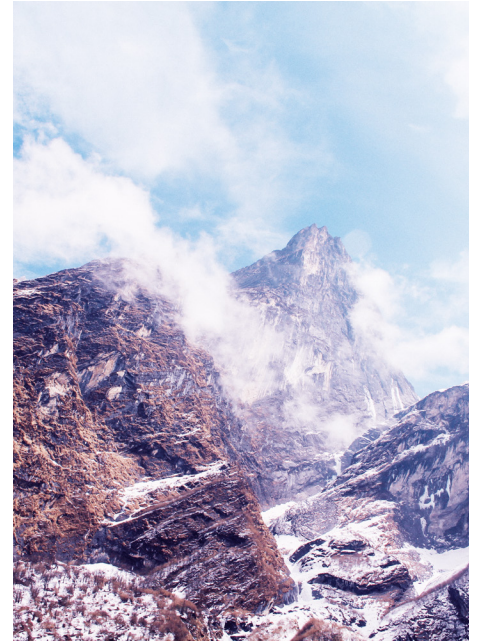


# Section Overview

The Playbook is organized into three sections. Section One and Two, Leading Self and Leading Others, are targeted to the emerging leader, and provide the practical tools and resources that support emerging leaders to proactively facilitate their own leadership development.

Section Three, Preparing Your Organization, is directed towards mentors, supervisors, and organizational leaders, and high-

lights specific tools, suggested resources, and case study examples for how to best position an organization for effective leadership development.



## Section One: Leading Self

In order to lead others you must be able to lead yourself. The best leaders possess a strong sense of self, demonstrate high emotional intelligence, and in general, are mindful, organized, and able to manage their work. Specific to the changing landscape, emerging leaders today are also developing strong personal brands and professional networks online. Section one provides the tools and resources that are foundational to effective leadership.

## Section Two: Leading Others

To lead others you must be a compelling communicator, strong listener, and an effective collaborator. It's imperative that leaders are able to manage teams and situations in ways that leverage and celebrate the unique strengths of team members, and propel the growth and development of each individual. This section helps you improve your ability to lead a group towards greater impact.

## Section Three: Preparing Your Organization

An organization that supports effective leadership development today has developed the right types of managers, environments, and processes to support emerging leaders. Section three describes the professional development practices, cultural dynamics, and structural components to mature the next generation of leaders who will successfully lead organizations in a new era of social change.



# User's Guide

Each section of the Playbook is divided into three parts:

## Objectives:

The key skillsets essential to effective leadership.

## Tips and Tools:

The required activities and actions to help master the key learning objectives.

## Additional Resources:

More resources you can put into action in order to successfully progress and support development in key areas.



**AS** emerging leaders, focus on the objectives and build the fundamentals. Pick the tips and tools that work best for you and your development. Engage with the resources as an opportunity to learn more and expand your thinking.

As mentors and organization leaders, integrate the resources that make sense for your organization, but also use this process as an opportunity to challenge developed habits and established routines. Test an idea or process and reflect on what resulted from your efforts; consider how to best adapt and move forward. Review the case studies to raise your awareness of what is happening and to reimagine what is possible your organization.

THEY ARE  
CLEARING A PATH  
FOR A NEW ERA  
OF LEADERSHIP



# PLAYBOOK OUTLINE

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## SECTION ONE – LEADING SELF

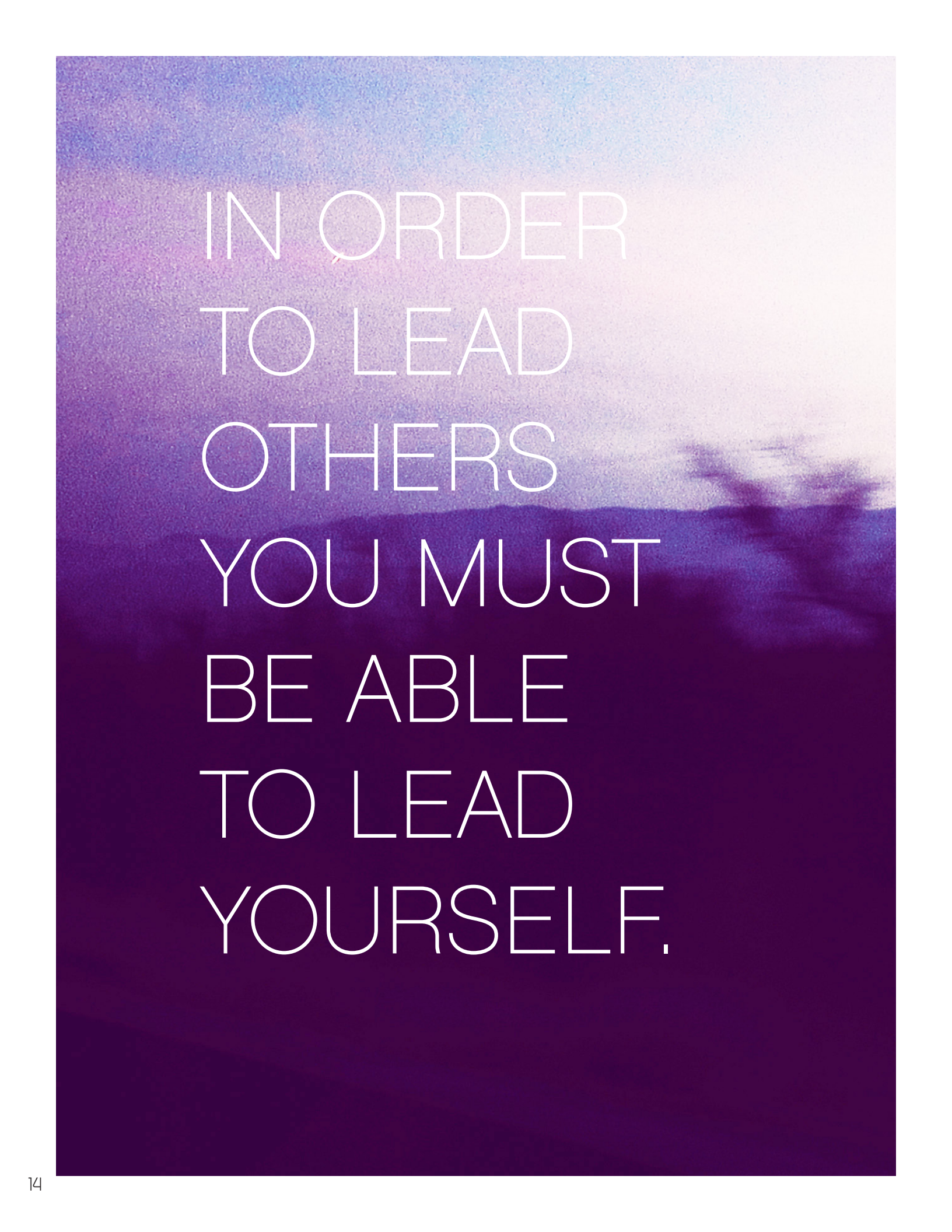
1. [Understand your personal values, strengths and culture.](#)
  - a. Create a personal mission statement
  - b. Develop a user manual
  - c. Identify your personal culture
  - d. Discover your values
  - e. Record and reflect on your development
2. [Understand your leadership style and use it purposefully.](#)
  - a. Learn about different leadership styles
  - b. Identify your leadership style
3. [Build emotional intelligence by practicing self-management, self-awareness, and empathy.](#)
  - a. Understand the importance of emotional intelligence
  - b. Embrace flexibility
4. [Build and maintain your online presence.](#)
  - a. Develop your online brand
  - b. Provide thought leadership
  - c. Be an effective curator of content

## SECTION TWO – LEADING OTHERS

1. [Build and enhance collaborative skills for leadership.](#)
  - a. Communicate your values
  - b. Define shared values
  - c. Build trust at all levels
  - d. Know when and how to delegate
  - e. Know when to manage up
  - f. Understand how to manage conflict
2. [Be an effective communicator.](#)
  - a. Be an active listener
  - b. Practice reflective listening
  - c. Learn how to run a good meeting
3. [Develop the capacity of others.](#)
  - a. Embrace and encourage feedback
  - b. Prioritize professional development
  - c. Celebrate failures
  - d. Create the right culture for your team
  - e. Value shared leadership
4. [Inspire a creative, diverse, and innovative team.](#)
  - a. Enable idea generation
  - b. Develop cross-sector and cross-functional relationships
  - c. Attend conferences and other networking opportunities
  - d. Commit to innovation
  - e. Build diverse teams

# SECTION THREE – PREPARING YOUR ORGANIZATION

1. [Develop current organizational leaders' capacity to support emerging leaders.](#)
  - a. Provide individualized, performance-based feedback
  - b. Become a partner in reflection
  - c. Raise emerging leaders' profiles
  
2. [Create a culture that inspires collaboration, reflection, and individual growth.](#)
  - a. Define organizational values and cultural norms
  - b. Articulate leadership competencies
  - c. Implement reflection practices
  - d. Allow for workplace flexibility
  - e. Encourage personal development
  
3. [Establish structures that provide leadership and growth opportunities.](#)
  - a. Prioritize strategic and challenging job assignments
  - b. Encourage individuals and teams to lead organizational initiatives
  - c. Commit to and implement performance evaluation plans
  - d. Provide formal professional development opportunities
  - e. Encourage mentoring



IN ORDER  
TO LEAD  
OTHERS  
YOU MUST  
BE ABLE  
TO LEAD  
YOURSELF.

A person with a backpack is seen from behind, looking out over a vast, hilly landscape. The terrain is covered in dense, low-lying vegetation in shades of green and brown. In the background, a steep, rocky mountain slope rises against a pale, overcast sky. The overall mood is one of quiet reflection and outdoor adventure.

SECTION 01

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Leading Self

**S**trong self-awareness, mindfulness, and social fluency are the foundation of effective leadership. Developing your professional relationships, interpersonal skills, and ability to communicate effectively will be critical to success in future leadership positions. You will also need to master the nuances of your online presence and networking capabilities. With a sophisticated understanding of self (and the way you relate to others in the workplace), you can take a positive next step in your career to enrich and strengthen the social sector.

To prepare for the array of challenges you will inevitably face as an emerging leader (navigating diverse communication styles, eliciting and providing feedback, etc.) you must possess a strong ability to manage yourself, your emotions, and be attune to the emotions of others.

## KEY OBJECTIVES and FUNDAMENTALS

1. [Understand your personal values, strengths and culture.](#)
  - a. Create a personal mission statement
  - b. Develop a user manual
  - c. Identify your personal culture
  - d. Discover your values
  - e. Record and reflect on your development
2. [Understand your leadership style and use it purposefully.](#)
  - a. Learn about different leadership styles
  - b. Identify your leadership style
3. [Build emotional intelligence by practicing self-management, self-awareness, and empathy.](#)
  - a. Understand the importance of emotional intelligence
  - b. Embrace flexibility
4. [Build and maintain your online presence.](#)
  - a. Develop your online brand
  - b. Provide thought leadership
  - c. Be an effective curator of content



## OBJECTIVE ONE: Understand your personal values, strengths, and culture.

An essential component of developing your leadership skills is a strong sense of self. This includes knowing your culture, values, and what drives you to do your best work. Articulating your personal values, strengths, and culture helps you understand how you are unique and how you fit into the culture of your organization and the social sector at large.

A clear understanding of self provides a foundation to develop your authentic leadership style and build on your strengths as an individual. Things about you will change over time, but revisiting your values and principles throughout your career will continue to renew your sense of purpose and your drive to lead others. Highlighted in [The Discipline of Building Character](#) (Harvard Business Review), by repeatedly going back to this foundation to inform your professional decisions, you are able to construct an authentic and strong leadership identity.

### Tips + Tools

- a. Create a Personal Mission Statement.** An organization will create a powerful and compelling mission statement to guide all of its efforts, but it is equally important for you as an emerging leader to take a step back and understand what personally drives you to do your best work every day. A clear articulation of what drives you will give context to your leadership choices and help guide your career.
  - Imperative's tool combines academic research with career coaching to help you discover your "purpose pattern." Learn more by filling out this customized tool, and consider sharing it with your colleagues –[What is Your Purpose Pattern?](#)

### Additional Resources

- Need some inspiration? [Personal Mission Statements of 5 Famous CEOs \(And Why You Should Write One Too\)](#) –Fast Company.
- Seven steps towards a personal statement –[Write a Personal Statement](#) –[Dr. Julie Connor Blog](#).

- A short list of questions can help you hone in on your personal mission statement –[15 Questions to Discover Your Personal Mission](#).

**b. Develop a user manual on how you work best.** Imagine if everyone came with a user manual: a guide to their communication style, work style, and preferences. Creating your own user manual is a great exercise in self-reflection and promotes more effective teamwork. Specifically, it's a tool to define the nuances of your work and communication style. Done in teams, this tool can be useful to highlight team dynamics and spark healthy dialogue around how to most effectively work with one another.

- All it takes is five steps to create your own user manual to share with your supervisor, your department, or your company at large –[Five Steps to Create a Personal User Manual](#).

### Additional Resources

- In his book *Quick and Nimble*, author Adam Bryant introduces the concept of user manuals in the workplace –[“What if You Had to Write a ‘User Manual’ About Your Leadership Style?”](#)
- Need a more concrete example? Here is a [template of a user manual](#) created by an executive leader of a small and scrappy company.

**c. Understand your personal culture.** For good reason, organizational culture is a popular discussion topic in the social sector. Defining culture is a powerful tool for distinguishing an organization, promoting the right types of behaviors, and connecting individuals to the work. (You'll read more about this in Section Two of the Playbook.) Organizational culture, however, is largely driven by individual staff members who bring their unique experiences, perspectives, and culture to their work. As emerging leaders it's important to understand your own personal culture in order to better empathize and communicate with all teammates.

- In [Knowing Your Own Culture in Order to Know Others](#), Dr. Sondra Thiederman prompts you to reflect on the importance of understanding your own personal culture and how it can contribute to your interactions with others.

### Additional Resources

- Institutions, companies, and even cities have a unique culture. Discover the two phases you can go through to discover [your personal culture](#).
- Community Toolbox's [Cultural Competence in a Multicultural World](#) chapter offers eleven sections on culture, covering everything from understanding culture and diversity to multicultural collaboration.
- EdChange offers instructions on how to lead a group through an [exercise](#)

to better understand the complexities and depth of the term “multicultural.”

- d. Discover your values.** You know your organization’s values, but it’s equally important to identify your personal values. Just as your organization’s values guide organizational efforts, so too do your personal values give your work meaning. Your values influence your core beliefs and your sense of what is worthwhile.
- Whether or not you have formally articulated your values, they do exist. This step-by-step guide by Mind Tools helps you articulate your values — [What Are Your Values?](#)

### Additional Resources

- Why are values critical for effective leadership? —[Determine What Will Make You Happy by Identifying Your Values.](#)
- “Three short steps to identify your core values” —[Living Your Values at Work.](#)
- Binghamton University has developed a short worksheet to help you [identify your values](#) by going through a series of questions and ranking your answers.

- e. Reflect and record your development by writing it down.** Maintaining a personal journal not only encourages mindfulness, but it’s also a tool to track your professional successes, challenges, and failures over time. Don’t overthink the length or content; the key is consistency. Develop a routine that is convenient and easy to keep, and you’ll be reflecting in no time.
- In her new book *The Progress Principle: Using Small Wins to Ignite Joy, Engagement, and Creativity at Work* (co-authored with Steven Kramer), Harvard Business School professor Teresa Amabile argues that keeping a journal is one of the best strategies for learning about yourself and improving your professional performance over time — [The #1 Productivity Tool You Aren’t Using.](#)

### Additional Resources

- You can go old school and grab pen and paper or, if you prefer to go the tech route, check out this [list of journaling apps.](#)

## OBJECTIVE TWO: Understand your leadership style and use it purposefully.

Just as we each have an individual work style, everyone has a unique approach to leadership. Reflect on what style works for you and best compliments your unique strengths and talent. Better understanding your style will help you maintain authenticity and be purposeful in your daily actions and communication. Effective leadership depends on your ability to lead with purpose; whether rallying your colleagues around a project or communicating priorities to donors and supporters, leading with purpose is motivating and inspires the realization of set goals.

- a. Learn about different leadership styles.** Start by understanding different types of leadership styles and reflect on which styles correspond with your personality and strengths, recognizing that every leader is unique and will create an individualized path.
- The following article highlights six main leadership styles, but notes that a good leader will have to shift styles according to the situation - [Six Leadership Styles, And When You Should Use Them.](#)

### Additional Resources

- A short, concise article on three timeless leadership traits - [Three Leadership Traits That Never Go Out of Style.](#)
- [Leadership Styles: Choosing the Right Approach for the Situation.](#) Effective leaders don't stick to just one style- different situations call for a unique approach.

- b. Identify your leadership style:** Building off of the knowledge surrounding various styles of leadership, begin to identify the key traits and characteristics that will define your leadership.
- This short quiz breaks down your answers in different leadership components and makes suggestions for areas of improvement - [How Good Are Your Leadership Skills?](#)

### Additional Resources

- Find your leadership style with this online assessment – [The Leadership Legacy Assessment.](#)

## OBJECTIVE THREE: Build emotional intelligence by practicing self-management, self-awareness, and empathy.

Individuals cannot create change in a bubble. Your ability to be successful and develop as a leader is affected greatly by your ability to read people and situations and manage each effectively. As you develop a stronger sense of self (through a deeper understanding of your mission, values, culture, and leadership style), you must also be mindful of how of you interact and build relationships with others.

Your teammates (interns, co-workers, supervisors, mentors, etc.) are important components of your professional life. Appreciating the nuances of your colleagues' culture, values, and communication styles will help you in everything from navigating a sticky situation to coming up with creative solutions to a workplace problem. Productively honing your emotional intelligence will allow you and your team to work effectively together to solve sector issues and achieve the greatest social impact.

### Tips + Tools

- a. **Understand the importance of emotional intelligence.** Experts in the private and social sector agree that emotional intelligence is foundational to good leadership. Five of the major components of emotional intelligence are: self-regulation, self-awareness, motivation, empathy, and social fluency.
  - This article provides tools to help you develop and understand each of the five components of emotional intelligence - [Emotional Intelligence in Leadership](#).

### Additional Resources

- Breaking down emotional intelligence, this article discusses the connection between each of the five components and successful leadership styles - [What Makes a Leader?](#)
- Embracing differences is one of the five ways you can lead with Emotional Intelligence - [Five Ways to Lead with Emotional Intelligence](#).
- This three-minute video "draws out" the importance of emotional intelligence - [Leading with Emotional Intelligence](#).

- b. **Embrace flexibility:** We're experiencing a movement to increase the integration

of work-life balance, or what some are now referring to as work-life blend, in organizations of all shapes and sizes. As a developing leader, explore flexibility in your work so you are in a better position to create the right work environment for your team.

- Some tips for how being flexible can improve your life at home and at work: [Eight Ways Flexibility Can Improve Your Life.](#)

## OBJECTIVE FOUR: Build and maintain your online presence.

In today's connected world, it is essential to build and maintain an online presence and enhance your online networking skills. Your social media presence should serve as a technological extension of your in-person, face-to-face persona. There are many opportunities - both online and offline - to gain exposure and build your professional network.

The added value of online networking is that it can quickly connect you with other industry leaders and mentors who are addressing similar issues and facing similar challenges. Suddenly, you have access to a host of individuals and organizations you may have never known existed. Building rapport with them and positioning yourself as someone who is an active and credible voice in online discussions is key for today's leaders.

### Tips + Tools

**a. Develop your online brand.** Online networking tools and communication platforms accelerate your ability to share your ideas and engage and connect with others. Your online presence should reflect who you are personally and professionally, but you must do so wisely. The tools below help you effectively navigate the personal-professional and public-private dynamics of a networked world.

- A strong understanding of your network will help you better leverage your existing network to connect with others. Whether it's [Professional Networking on LinkedIn](#), [Building Your Personal Brand on Twitter](#) or just [Finding Your Brand Voice](#) —there are a number of ways that you can begin to professionally build your online presence.

### Additional Resources

- Successful branding is based on authenticity. These seven steps help

- you uncover [your personal brand](#).
- Five simple, non-intimidating steps you can take to network on LinkedIn and Twitter – [Five Better Ways to Network on LinkedIn and Twitter](#).
- This author shares how he went from having no network in a new city to having a robust network online – [How I Built A New Network on LinkedIn](#).

**b. Provide thought leadership.** How are you sharing your ideas with individuals internally and externally? Are you sending interesting articles around for people to read at their leisure? Are you blogging or tweeting, either personally or professionally? There are a number of ways you can offer your perspective that can help you build your personal brand and develop your thought leadership. At its core, thought leadership is about becoming an authority on a relevant topic and delivering powerful ideas to your audience. Thought leaders should intrigue, challenge, and inspire people.

- Establishing yourself as a thought leader enables you to leverage the work of your organization to drive conversations on long-lasting change in the social sector. In [The Golden Rules for Creating Thoughtful Thought Leadership](#) learn more about how to establish yourself and your organization as a thought leader.

#### Additional Resources

- Thought leadership should be about a big idea that changes how people perceive the world. Learn [How Inspirational Leaders Communicate](#) in this article from Fast Company.

**c. Become an effective curator of content.** Content curation, the process of sifting through links, blogs, articles, etc. and selecting the best ones to share online, is an effective technique for building thought leadership, encouraging professional learning, and influencing a broader network.

- Learn how to turn all that you have accumulated into shareable social media content – [How Nonprofits Get Significant Value from Content Curation](#).

#### Additional Resources

- What is “spotting the awesome” and why is it important to your social media strategy? [Content Curation: The Art of Spotting Awesome](#).
- Live tweeting from events is a great way to build excitement around your cause and engage constituents – [Ten Tips for Live Tweeting from Events and Everything You Need To Know To Live Tweet An Event](#).
- Creating lists of followers on Twitter is a great way to organize your content and time, while maximizing engagement – [How To Use Twitter List To Follow Thousands Effortlessly](#).



AS EMERGING  
LEADERS,  
FOCUS ON THE  
OBJECTIVES  
AND BUILD THE  
FUNDAMENTALS.



A photograph of three people sitting on a rocky outcrop in a forest, looking out at a large pine tree. The scene is bathed in soft, golden light, suggesting late afternoon or early morning. The people are wearing outdoor gear, including jackets and hats. A camera on a tripod is visible on the right side of the frame. The text 'SECTION 02' is centered in the upper half, followed by a decorative line of diamond shapes, and 'Leading Others' is centered below that.

SECTION 02

Leading Others

Great leaders shape great organizations that are able to attract great talent, and ultimately have a greater impact in the world. It's a virtuous cycle, and it takes a willingness among leaders to create the space and empower individuals to encourage innovative and collaborative approaches to problem solving. Whether managing an internal team of employees, leading an external project, or building a collaborative movement with external partners, building off of the foundational skills in Section One, self-awareness and confidence are paramount for motivating individuals and diverse teams toward greater impact.

## KEY OBJECTIVES and FUNDAMENTALS

1. [Build and enhance collaborative skills for leadership.](#)
  - a. Communicate your values
  - b. Define shared values
  - c. Build trust at all levels
  - d. Know when and how to delegate
  - e. Know when to manage up
  - f. Understand how to manage conflict
2. [Be an effective communicator.](#)
  - a. Be an active listener
  - b. Practice reflective listening
  - c. Learn how to run a good meeting
3. [Develop the capacity of others.](#)
  - a. Embrace and encourage feedback
  - b. Prioritize professional development
  - c. Celebrate failures
  - d. Create the right culture for your team
  - e. Value shared leadership
4. [Inspire a creative, diverse, and innovative team.](#)
  - a. Enable idea generation

- b. Develop cross-sector and cross-functional relationships
- c. Attend conferences and other networking opportunities
- d. Commit to innovation
- e. Build diverse teams

## OBJECTIVE ONE: Build and enhance collaborative skills for leadership.

The modern workplace is changing. Today, “going to work” no longer means arriving at a specific location, punching the clock, and working on a specific task with the same people every day. While the nature of the work may not significantly change, where and how people work together is—and it’s prompting organizations to try different approaches to increase productivity and impact.

The top-down, hierarchical management styles made popular over the past century are beginning to evolve. This evolution is helping employees at all levels feel more empowered to take part in an organization’s decision-making process. As emerging leaders, it’s important to understand and recognize how these new and collaborative approaches can benefit you and your organization. Managers must be able to lead in this rapidly changing environment, and employees must be able to understand how to collaborate and adapt to work more effectively.

### Tips + Tools

- a. Communicate your values.** As an emerging leader, it is important to feel confident about your organization’s culture and values and what they mean both internally and externally. Workplace culture reinforces the way a business operates with both spoken and unspoken beliefs—from how workers dress, to what time they come in, how they spend their lunch hours, or how they create solutions for internal and external issues. Your organization’s values and culture should help inform all of the decisions you make. Because of this, it’s important to take time to make sure the work you produce and the decisions you make, align with your organization’s culture and values.
  - This [worksheet](#) adapted from The Bridgespan Group will help you assess your organization’s values and culture so that you can better understand how to apply them to your work.

### Additional Resources

- In Zingerman's Unique Approach to Business, learn [Five Steps to Building an Organizational Culture](#).
- [Workplace Culture: What it is, Why It Matters, How to Define It](#). In ERC HR Insights Blog.
- What makes for a great culture? Here are [Six Components of a Great Corporate Culture](#) as outlined in Harvard Business Review.

**b. Define shared values.** Collaborative leaders define shared values at the beginning of a project and then allow solutions to develop from the best ideas of the group rather than an individual. While the end goal may not always be readily apparent, you can help lay the foundation by creating processes to get there. It's important to think about how you will set the tone from the onset of a project.

- Consider establishing a [team charter](#). Team charters help define the purpose of the team, how it will work, and what the expected outcomes are. They are "roadmaps" that the team creates at the beginning of the journey to ensure buy-in - everyone involved has helped shaped the process.

### Additional Resources

- In this piece from Opportunity Knocks, learn more about [Nonprofit Culture and Why It Matters](#) to your organization.
- Shared values, norms, and mutually agreed upon practices are perhaps the most critical components of a philanthropic organization. More in [Why Your Nonprofit Values Matter More than You Think](#).

**c. Build trust at all levels.** Building a culture of trust and transparency is paramount when working to address complex social problems. As a leader, it's important that you set an example. Show your team members how critical trust is to you by demonstrating your trust in them and in your colleagues. A leader can convey trust by encouraging team members to continuously question, analyze, and investigate all options in order to make informed decisions and continue to identify the best solutions. Take time to know each other personally. Start by sharing personal information about yourself, and pursue opportunities for team building.

- [The Jacobs Model](#) for trust in the workplace links eight intrinsic drivers of trust, each impacted by an individual's psychological well-being and work environment, to two paths of performance, leading to either positive or negative outcomes.

## Additional Resources

- In Rachel Botsman's TED Talk, [The Currency of the New Economy is Trust](#) she explores the currency that makes systems like Airbnb and Taskrabbit work: trust, influence, and what she calls "reputation capital."
- [Leaders, Followers and Trust](#): what your actions say to your followers about trust in Psychology Today.

- d. Know when and how to delegate.** Delegation is fundamental to efficiency, but only when done in a way that capitalizes on the individual strengths of team members. But even before you begin delegating, take the time to really get to know your team. It's important to allocate work in ways that empower others to do their best and play to their strengths.
- [The Management Center's MOCHA model](#) provides a one-page worksheet to help you define: who is responsible for success, who should have input, who needs to sign off, etc.

## Additional Resources

- [Effective Delegating in Three Steps](#) offers a guide for emerging leaders from The Bridgespan Group.
- In [Why Aren't You Delegating](#) Harvard Business Review makes the case for delegating and provides some recommendations for how to improve delegation.

- e. Know when and how to manage up.** The idea of managing up is to stretch yourself and find ways to go above and beyond the tasks assigned to you so that you can enhance your manager's work. As emerging leaders, "managing up" may be one of the most difficult roles to play, but if done well it's also a key way to build your reputation internally.
- In the HBR article [Managing Your Boss](#)—simple acts like maintaining a good attitude, jumping in when needed, building relationships, and doing quality work are all seen as critical to building trust with your manager.

## Additional Resources

- The Concept of Managing Up may not be a common understanding, but as this Wall Street Journal article shows, [What It Means to Manage Up](#) can be important for your long-term growth.
- More on [The Dos and Don'ts of Managing Up](#) in Idealist Careers.

- f. **Understand how to manage conflict.** Conflict in the workplace is inevitable, but it's not always a bad thing. How you are able to handle conflict is key.
- In [Five Ways to Manage Conflict Before it Manages You](#), Thomas Kilmann defines conflict as any situation where your concerns or desires differ from those of another person. According to Kilmann's model there are five basic modes of handling conflict: competing, collaborating, compromising, avoiding, accommodating.

### Additional Resources

- [How to Avoid Arguments and Confrontation in the Workplace](#) offers video with examples of how to carry on conversations in a work environment that empowers others.
- Some conversations in the workplace are harder to have than others, this Harvard Business Review article offers some techniques to consider in [How to Handle Difficult Conversations at Work](#).

## OBJECTIVE TWO: Be an effective communicator.

Effective communication in today's hyper-connected world is much more complex than simply knowing what to say and when or how to say it. Because of the speed of our communications, leaders today must be prepared to respond quickly, decisively and in a way that is aligned with the vision, values, and objectives of the organization.

### Tips + Tools

- a. **Be an active listener.** Leaders who are able to truly listen discover the real messages in the conversation, ask open-ended questions to help stimulate new ideas, and understand how the concepts they hear can improve an organization's productivity and success.
- [Ask good questions](#). You don't have to always have the answer to ask a good question. While providing an answer may be the most efficient way to get something done, you may also cheat yourself access to some fresh and powerful new ideas.

## Additional Resources

- Ten practical, straightforward steps that will help you become an active and effective listener: [10 Steps to Effective Listening](#).
- Mindtools offers a guide to [Active Listening –Hear What People are Really Saying](#).

**b. Practice reflective listening.** An effective leader actively solicits the ideas and opinions of others rather than just sharing his or her own. Make sure that all voices around a table are heard, not just the loudest one. Reflective listening is a communication strategy that seeks to understand a speaker's idea, then offers the idea back to the speaker, to confirm the idea has been understood correctly.

- In [Reflective Listening Helps Build Rapport](#), read examples of reflective responses to understand how you can incorporate them into your communication style.

## Additional Resources

- Not sure about the difference between active and reflective listening? Front Office Staff Blog breaks it down for you in this piece - [Reflective Listening in the Workplace](#).

**c. Learn how to run a good meeting.** People complain about meetings all the time, but when done well, yield productive conversations and measurable results. Develop a reputation for chairing good meetings and people will attend and participate at a higher level.

- Before, during, and especially after a meeting, remember to be action oriented. Other than the obvious points about starting on time, being prepared, and ensuring the whole team is involved, here is a list of other things to help you improve your regular team meetings: [Eight Secrets to Better More Productive Meetings](#).

## Additional Resources

- Eric Schmidt and his team at Google developed a set of meeting guidelines to turn "demoralizing time wasters" (aka meetings) into opportunities for efficient organization and morale boosting. More in [How to Run a Meeting Like Google](#) –Business Insider.
- [Tools for Effective Team Meetings](#) –Association of American Medical Colleges

## OBJECTIVE THREE: Develop the capacity of others.

One of the least talked about skills of leadership is the ability to develop others. The development of individuals is hard work and takes time, but people (and the right people at that) are your key asset in making change. The most current thinking on effective professional development centers on a continuous cycle that includes both formal experiences (classroom and online courses) and informal experiences, such as collaboration, coaching, feedback, and access to knowledge.

### Tips + Tools

- a. Prioritize professional development.** Smart leaders are aware of their shortfalls so they are able to continue learning what they don't know. Learning should be viewed as a constant process throughout your professional life. Make sure to never stop reflecting on areas of growth and seeking opportunities for professional development.
  - Take advantage of online trainings. Make sure your team knows about outlets for continuing to develop their own knowledge through sites like [skillshare.com](http://skillshare.com), or MOOC's (Massive Open Online Courses) like Coursera or Udacity where you can take university courses online for free.
  - Volunteer leadership opportunities, professional associations, or small teams in the workplace can all provide great development opportunities. Pursuing these opportunities can also put you on the radar of senior leaders, potential mentors, and recruiters. Serve on the board of a local organization, and [Understand How to be an Effective Board Member](#).
  
- b. Celebrate Failures.** Leverage problems as opportunities for real world learning and development. Learning organizations see problems as opportunities. There are ways to do this so that you encourage constant innovation rather than stifling creativity for fear of mistake.
  - Encourage postmortems and implement a process for reflection at the end of a team project. Consider inviting members from outside the team or department who can ask questions. At the culmination



of a project, ask your team to list the top five things they would do again and the top five things they wouldn't repeat. More on some creative approaches to recognizing failure in the article [Take a Failure Bow](#).

### Additional Resources

- [Build-Measure-Learn](#) –Consider ways to incorporate principles from the Lean Startup Methodology to strengthen your ability to iterate and improve on a project.
- [Failure is The Only Option If Success is the End Goal](#) –Fast Company.

- c. Create the right culture for your team.** Organizational culture defines the way that a team interacts and works. Typically, culture is set by an organization's leaders, but it can also be developed with input from everyone in the company. If everyone feels they are part of shaping the culture, they'll be more likely to live it and spread it into all facets of their work.
- What matters is that the organization lives by its values, reinforces them every day, and doesn't tolerate behavior that is at odds with the agreed-upon culture. Encourage your organization's leadership to organize a company offsite meeting focused on culture. SY Partners has created a [facilitator's guide](#) to help organizations collectively craft their culture.

### Additional Resources

- [Influence and Knowing the Norms](#) –a checklist to consider when articulating your organization's cultural norms in All Things Workplace.
- [Guess Who Doesn't Fit](#) –this New York Times piece explores the value organizations are placing on "cultural fit," and why that may not always be a good thing.

- d. Embrace and encourage feedback.** Providing workers at all levels of your organization a chance to express their thoughts increases their desire to take a more personal stake in the organization. Adopt the mindset that feedback, positive and negative, is designed to help you improve. To best engage with feedback, listen intently without judgment and ask clarifying questions.
- Ask yourself questions as a way to process what you're hearing: In what ways does the feedback you're hearing align with your self-identified areas of improvement? What does this feedback teach you about how you're being perceived? More questions and tips on how to take the fear out of feedback at [Unstuck](#).

### Additional Resources

- [Three Ways Feedback Serves as a Highly Effective Career Advancement Tool](#) –Forbes.
- Don't be shy, here's how you can [Get Feedback from Employees](#) in Inc. Magazine.

- e. Value shared leadership.** Unlike traditional notions of leadership that focus on the actions of an individual, shared leadership refers to responsi-

bilities shared by members of a group. Marshall Goldsmith, a leading executive educator and coach, describes it this way: “Shared leadership involves maximizing all of the human resources in an organization by empowering individuals and giving them an opportunity to take leadership positions in their areas of expertise.” Sharing leadership may not be easy, but it’s possible, and in many cases, can be exactly what an organization needs to move to the next level.

- Utilize the [Collaborative Leadership Self-Assessment Questionnaires](#) from Turning Point (see page 7). Use this self-assessment tool to determine whether or not shared leadership would work well given the realities of your workplace environment.

### Additional Resources

- [Doing More With More Putting Shared Leadership Into Practice](#) – Nonprofit Quarterly.
- [Create a Culture of Shared Leadership in Your Nonprofit](#) –Cause Planet Blog.

## OBJECTIVE FOUR: Inspire a creative, diverse, and innovative team.

Inspiring leaders create shared purpose and engage others in authentic and transparent ways. As a collaborative leader, one of your most important tasks is to help create a process that not only values but also creates the space for a collaborative process that engages and inspires everyone.

The good news for emerging leaders is that creativity is malleable. Engaging in new experiences can broaden your exposure to people and ideas very different from your own and can lead to greater creativity. The implication for leadership development is that you should be supported to pursue opportunities that will help you develop perspectives that transcend sectors and industries.

### Tips + Tools

- a. Enable idea generation.** Learning and change are risky endeavors, but the more opportunities a team has to share ideas and take part in the creative process, the faster they will be able to get on board and embrace new direction or focus. Be open to new ideas even if they conflict with previously held beliefs, and more importantly, create space to explore these new ideas.
  - Schedule creative time or idea generation. Dedicate one hour per week (yes, block it off on your weekly calendar) for high-level thinking and creative brainstorming. Consider these [everyday tools to inspire creativity](#). Use your imagination to embrace wild and exaggerated ideas. Place a premium on what may appear too far out encourages team members to expand their thinking.

## Additional Resources

- [Seven Ideas For Generating Ideas](#) - Innovation Resource Blog.
- [Generating New Ideas –Thing Differently Spark Creativity - MindTools.](#)

**b. Develop cross-sector and cross-functional relationships.** You cannot achieve a new level of internal leadership without having a pulse on what's happening across your organization and awareness of larger trends influencing your field and the social sector at large.

- Get out of the office. Make it a habit to grab coffee with individuals in related and non-related fields. Read books that stimulate new thinking. Find events for collaborating with others in and outside of your issue area.
- Encourage cross-function collaboration. When possible, find opportunities for cross-function interaction and collaboration, such as inviting individuals from other departments or teams for a team brainstorm or debrief. Set up site visits between employees working in different environments.

## Additional Resources

- [A Practical Guide to Cross-Sector Collaboration](#) — The Guardian.
- Reflections from the Gap Foundation's Bobbi Silten on [running a cross-sector collaboration.](#)

**c. Attend conferences and other networking events.** Attending conferences and industry specific gatherings allows you to be at the forefront of your field, as well as connect with others in your space.

- Observing and interacting with constituents and relevant stakeholders in their environment can lead to newfound realizations. Spend time in the field. The closer you can get to the work on the ground, the better equipped you will be when it comes time to make decisions about how to best support a partner's work.

## Additional Resources

- Not sure where you should be? Here's a list of some of the most popular [Social Sector Conferences in 2015](#), check back often as this list is updated.
- In order to really get the most out of a conference experience, [consider these guidelines](#) before, during, and after the event.

**d. Commit to innovation.** Don't get caught up in seeing innovation as some magical process achieved only by exceptional individuals or teams. Sure, innovation may not be simple or predictable, but there are processes you can put in place to ensure that you are creating the right structure for innovation to flourish.

- On each project, aim to spend 10-percent of your time and energy on trying to iterate, create, or improve an aspect of your work. The percentage of time will differ based on the maturity of your organization—it should be much higher for early stage organizations.

## Additional Resources

- [Development, Impact and You is](#) a toolkit to help social impact organizations trigger and support innovation.
- [This TED Talk by Tim Brown, CEO of IDEO](#), introduces you to the concepts behind Design Thinking and how it can be applied to social change.

**e. Build diverse teams.** While traditional notions of workplace diversity were limited to representation of various races, genders, and religious backgrounds, today's concept of workplace diversity is all-encompassing. Aside from these variables, considerations are also made on personality, age, skillset, education, background, and more. Recent research confirms that diverse teams (defined by both inherent diversity and acquired diversity) generate better ideas. Leaders must be able to mobilize individuals from diverse backgrounds and with diverse skill sets to facilitate effective teamwork.

- Just as you reflected on your own culture and values (see Section One), it is also important for teams to acknowledge their assumptions of other cultures. Define the type of diversity that your organization needs to succeed. Identify what is important for your organization and then set the appropriate goals and measures so that employees understand what is needed to succeed in this endeavor.

## Additional Resources

- [Creating a Workplace Culture that Embraces Diversity](#) — Biz Journals.
- [Four Ways to Embrace Diversity for Workplace Success](#) — Entrepreneur.
- [Diversity at Work –Why a Diverse Team Matters](#) — HR Council.



SOME  
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# SECTION 03



## Preparing Your Organization



## MENTORS and ORGANIZATIONAL LEADERS

Employees and emerging leaders consistently rate leadership development among the most important factors of job satisfaction. At the same time, they often expect organizations to create highly individualized, authentic, and experiential programs in order to achieve this.

As organizational leaders, it's important to have management systems that foster leadership development and create opportunities for employees to grow in meaningful ways. Leaders can emerge in a variety of capacities and at all levels of an organization. A new generation of leaders are ready to take initiative; provide emerging leaders the space and the support to take on new challenges, experiment, and develop their leadership capabilities.

To successfully prepare and usher in the next generation of leaders, three core components of your organization must be addressed: 1) current leaders' mindsets and management practices; 2) organizational culture; and 3) organizational structure.

This section also includes some examples of real companies and organization leaders that embody the core components of effective leadership development, preparing their people for leadership roles and establishing the right environment to support individual and organizational growth.

### KEY OBJECTIVES and FUNDAMENTALS

1. [Develop current organizational leaders' capacity to support emerging leaders.](#)
  - a. Provide individualized, performance-based feedback
  - b. Become a partner in reflection
  - c. Raise emerging leaders' profiles
2. [Create a culture that inspires collaboration, reflection, and individual growth.](#)
  - a. Define organizational values and cultural norms
  - b. Articulate leadership competencies

- c. Implement reflection practices
  - d. Allow for workplace flexibility
  - e. Encourage personal development
3. [Establish structures that provide leadership and growth opportunities.](#)
- a. Prioritize strategic and challenging job assignments
  - b. Encourage individuals and teams to lead organizational initiatives
  - c. Commit to and implement performance evaluation plans
  - d. Provide formal professional development opportunities
  - e. Encourage mentoring

## OBJECTIVE ONE: Develop current organizational leaders' capacity to support emerging leaders.

The next generation of leaders is currently transitioning into management positions, but in large part, many organizations are not ready for them to assume leadership roles. According to an Ernst & Young study, only 5 percent of Millennials are perceived as being ready to lead. The responsibility falls on the leaders of the organization to affect seamless leadership transitions and healthy succession.

To support leadership development, organizational leaders must adopt the right mindsets and develop the most effective practices to celebrate the unique strengths of emerging leaders, as well as facilitate a perception shift within the workplace that encourages new leadership. The following tips and tools aim to improve the capacity of current leaders to better support the growth and development of their employees.

### Tips + Tools

**Provide individualized, performance-based feedback.** Personalized, constructive, and timely feedback motivates employees and is the most powerful driver of growth and development. Emerging leaders tend to be eager for coaching and hungry



for feedback, but for mentors and supervisors, it's not always easy to give feedback, especially when you are focused on coaching and supporting a high performer and identified emerging leader.

- We've sourced some best practices for mentors to use for an effective approach to providing emerging leaders constructive feedback (adapted from Harvard Business Review, [Giving a High Performer Constructive Feedback](#)):
- Begin by expressing gratitude for current, high-level performance.
- Focus on the next level of performance, a new project or role, and include a discussion around potential obstacles and challenges.
- Identify future goals, posing questions such as, "What do you want to be known for?" and "What matters to you most?"
- Always end feedback sessions by asking how you as the supervisor can better support their high performance.

### Additional Resources

- Another informative Harvard Business Review article on how to provide effective feedback: [Feedback that Works](#).

**a. Become a partner in reflection.** Employees most value managers who make time for one-on-one meetings that are focused on problem-solving. For mentors and supervisors, the first step is to schedule regular time and commit to it, resisting the temptation to cancel based on day-to-day demands that may arise. Second, and more challenging, is a mentor and supervisor's ability to ask great questions that help drive growth and development. In Google's internal research on building better bosses, some of the key findings around employees' opinions of their managers are as follows: employees most value even-keeled bosses who make time for one-on-one meetings; who did not dictate answers but rather help people puzzle through problems by asking questions; and who take an interest in their employees' lives and careers. Shellye Achambeau of MetricStream stresses the importance of asking great questions: "Make sure that when people come in with challenges and problems, the first thing you're doing is actually putting it back to them and saying: What do you think we should do about it? How do you think we should approach this?"

- We have compiled a list of open-ended questions, aligned with learning objectives from this Playbook, which aim to serve as helpful conversation starters and contribute to meaningful check-ins: [Sample guiding questions aligned with "Leading Self" and "Leading Others" learning objectives](#).

**b. Raise emerging leaders' profiles.** In addition to supporting the actual development of emerging leaders, it is equally important to message their competency and capability to the rest of the organization. There are several strategies, internally and externally focused, that can help raise the visibility of emerging leaders and better prepare the organization for leadership transitions.

- Send emerging leaders to conferences and industry-related events as representatives of the organization and to gather information. Schedule a presentation for the leadership team so the emerging leader has an opportunity to synthesize and communicate key takeaways, findings, and implications.
- Encourage emerging leaders to pursue thought leadership opportunities, whether it's writing for a company blog or writing articles for external publication.
- Support emerging leaders to pursue board leadership, utilizing programs like [Board Match](#) through The Volunteer Center to identify opportunities.
- Provide emerging leaders with exposure in public speaking and meeting facilitation opportunities both internally and with clients.

## OBJECTIVE TWO: Create an organizational culture that inspires collaboration, reflection, and individual growth.

Every organization has unique expectations and mindsets about its work, formal or informal, from which individuals and teams operate. These underlying rules are powerful influencers for how culture is created and have a direct impact on workplace environment and organization success.

Culture is driven and enforced by leadership. Leaders must be proactive and purposeful in creating the right type of culture that encourages the best work and promotes the growth and development of individuals and teams. Pixar's CEO speaks at every orientation session for new hires, specifically to highlight the mistakes the company has made and the lessons learned, emphasizing Pixar's culture of iteration and innovation. Leaders should take advantage of every opportunity to encourage individuals to question organization practices and generate new solutions.

The following tips and resources provide methods for creating a culture that is unique to your organization and fosters growth and continuous improvement.

## Tips + Tools

- a. Define organizational values and cultural norms:** People will strive for improvement and innovation when they are more connected to the work. Mark Templeton, CEO of Citrix: "I think people generally want to belong to something of greater purpose that's larger than they are... People say, 'I want to be on that team, that club, because they believe in something.'" Articulating workplace culture should distinguish an organization and resonate with employees. Specific to leadership, organizational values and norms create avenues for individuals to explore new initiatives. For example, an organization value based on continuous improvement encourages individuals to identify and create new solutions for the organization.
- Use the following set of questions to guide a team exercise to set cultural norms –the ways in which you interact and work with one another and the expectations you have for individuals and teams: [Generating Cultural Norms](#).

### Additional Resources

- [How Pixar Fosters Collective Creativity](#) –Harvard Business Review.
- [Quick and Nimble: Lessons from Leading CEOs on How to Create a Culture of Innovation](#) by Adam Bryant.

- b. Articulate leadership competencies.** Defining your organization's specific leadership competencies helps clarify for emerging leaders the specific skills and behaviors that will be required of them as they advance in their career. A clear articulation of leadership competencies also helps current leaders focus their management and coaching, and provide a baseline for identifying top talent and future leaders.
- Competencies should be measurable, able to be learned, and be unique to the organization. Google's list is an exemplary model –[The Top 8 Qualities of Leaders at Google](#).

### Additional Resources

- [Leveraging Leadership Competencies to Produce Leadership Brand: Creating Distinctiveness by Focusing on Strategy and Results](#) –Jim Intagliata, Dave Ulrich, and Norm Smallwood.

**c. Implement reflection practices.** Reflection is a necessary step in assessing individual and team performance, and helps to illuminate when and why things went well, as well as lessons learned. Beyond individual check-ins (which generally focus on an individual's strengths, weaknesses, and areas of improvement), consider ways to promote reflection organization-wide, which can inspire leadership and organizational improvement.

- As discussed in Section Two, implement a reflection process at the end of a team project and consider inviting members from outside the team or department who can ask questions and provide input. Ask your team: "What are the top five things you would do again and the top five things you wouldn't repeat?"
- Utilize reflection routines throughout a project, such as [Insights, Implications, and Puzzles](#).

**d. Allow for workplace flexibility:** According to research by Cisco Systems 69% of Millennials believe regular office attendance is unnecessary. Flexibility in the workplace is becoming a common expectation as the traditional 9-5 work day is being phased out in our hyper-connected culture. Some companies view flexibility not as another HR program or "perk" but rather as a new, and perhaps better way of working.

- Set clear expectations, (e.g. at IDEO where employees are expected to be present in the office between 10:00 a.m and 4:00 p.m.), but otherwise empower individuals to manage their schedule and hours. Consider your organization's culture and the way work gets done and decide on the appropriate level of flexibility that will accommodate other work styles without negatively impacting organizational culture. For example, if your organization operates in an open-work space, consider allowing employees the option to work remotely a few times per month if they need a more quiet space for writing or intense critical thinking.

### Additional Resources

- [The Accelerated Millennial Manager: Preparing a New Generation for Leadership Success](#) Devon Scheef and Diane Thielholdt.
- [Flexible Workspaces: Employee Perk Or Business Tool To Recruit Top Talent](#) –Forbes.
- [The 2015 Workplace Flexibility Study](#) - Workplace Trends.

**e. Encourage personal development:** A proven method of leadership

development is the opportunity to experience new things; new experiences lead to new observations and realizations. Personal exploration can help emerging leaders broaden their understanding or ways of thinking about an issue, and help individuals become more adept at leading diverse teams.

- Allow time for individuals to spend time in the field, engaging with different people in new environments. For example, employees of an organization working in improving education outcomes should regularly have opportunities to experience education in a variety of settings, able to observe and interact with students, teachers, community members, etc.
- Encourage “true” vacation days (don’t look at your email) as an opportunity for emerging leaders to truly unplug, rejuvenate, and observe the world. Individuals will come back refreshed and with new perspectives, enriching their work.

## OBJECTIVE THREE: Establish an organizational structure that provides leadership and growth opportunities.

The timeless 70-20-10 professional development model (circa 1960s) demonstrated that about 70 percent of learning happens on the job through carefully selected “stretch” assignments, 20 percent happens through individualized coaching to help employees succeed in those projects, and 10 percent happens through formal training. Nonprofits tend to over-invest in the most expensive methods—purchasing books, trainings, conferences, etc. But a recent study on nonprofit leadership development identified the most effective methods for leadership development: change in scope or role (rotating through functions, being coached through a new position); mentorship; managing hardships or crisis; and personal or life experiences.

The following tips and resources should help organizations structure more meaningful and cost-effective leadership development on-site.

### Tips + Tools

**a. Prioritize strategic and challenging job assignments.**

Employees report that they want to help solve problems, but recognize that the complexity of problems we face often require a hybrid approach in order to generate dynamic solutions. Help individuals work beyond their department, breaking down silos and providing opportunities to collaborate more broadly.

- In accordance with the 70-20-10 breakdown, assign dynamic, challenging projects to emerging leaders that present a new challenge and opportunity to develop skills. “Stretch” projects should include coordination from various members or departments, stakeholder engagement, public speaking, professional networking, market research, etc. These projects should provide the chance to develop new skills, or improve existing skills, and exposure to new networks and experiences.

### Additional Resources

- [Developmental Assignments: Creating Learning Experiences without Changing Jobs](#) by Cynthia McCauley.
- [Leadership Development: Five Things All Nonprofits Should Know](#) – Stanford Social Innovation Review.

**a. Encourage individuals and teams to lead organizational initiatives.**

There are a number of ways to create leadership opportunities within the organization for individuals to gain more experience and develop critical skills. Encourage employees to assume a variety of leadership roles within the organization, which are both cost-efficient and effective. Example range from assigning emerging leaders to manage junior staff, interns, and volunteers to leading portions of monthly staff meetings or team building activities.

- Identify an internal organizational challenge, such as the efficiency and effectiveness of learning and sharing best practices. Propose the challenge to staff to elicit a volunteer to develop a solution to the challenge. Engage leadership and schedule a series of presentations for the individual to communicate their thinking and propose recommendations.

### Additional Resources

- A more comprehensive list of leadership opportunities generated by The Bridgespan Group – [52 Free Development Opportunities for Nonprofit Staff](#).

**b. Commit to and implement performance evaluation plans.**

Nonprofit organizations have developed a legacy of neglecting performance evaluations (mostly due to capacity constraints), but in doing so, miss out on an effective method to develop and retain top talent. 360 reviews, which incorporate feedback from various individuals including supervisors, peers, clients, managers, etc. are generally proven to be more effective for highlighting an individual's strengths, weaknesses, and areas for growth, as compared to boss-only reviews. These reviews are commonplace in the corporate setting, but rarely used in nonprofit organizations.

- Select assessment tools from this comprehensive list of the various psychological and professional assessments that have been developed to help organizations optimize the career development of key personnel –[Testing to Help Develop Current and Future Leaders](#).
- A series of guiding best practices and some proven methods to consider –[Conducting Performance Evaluations](#) (Minnesota Council of Nonprofits).

**b. Provide formal professional development opportunities.**

Regardless of the level of resources available for professional development, every organization is capable of and should focus on generating excitement around learning and growth. Every individual of the organization should be asked to articulate their passions and interests and be provided with personalized, relevant opportunities.

- [The Acumen Fund](#) provides a plethora of free, online courses geared towards developing essential social sector skillsets including impact analysis, storytelling, scalability, human-centered design, etc.
- [Emerging Practitioners in Philanthropy](#) (EPIP) hosts free or reduced-cost leadership webinars.

**c. Encourage mentoring:** We have emphasized the importance of matching emerging leaders with a mentor to guide their leadership development, but emerging leaders should also be encouraged to be a mentor to others.

- When individuals from the outside world contact your organization for a job inquiry, connect them with an emerging leader as an opportunity to practice telling their professional story and offer guidance to the individual in their career path.
- Encourage emerging leaders to be involved in their alumni networks.
- Assign reverse mentoring roles where a younger employee

serves as a mentor to a more senior colleague with the purpose of sharing knowledge and expertise in a certain area.



# Assessing Your Organization's Culture Worksheet

## Work Style

1. How do we get our work done?
  - a. Collaboratively? Independently? A combination?
2. How do we make decisions?
  - a. Consensus-driven? Authoritatively?
3. How do we communicate?
  - a. Verbally or in written form? Directly or indirectly?
4. What are our meetings like?
  - a. Serious? Lighthearted? Tightly or loosely structured?

## Professional Opportunities and Advancement

1. What types of people tend to do well here?
  - a. Individual contributors? Team players? People who are proactive or more responsive?
2. How are we structured?
  - a. Hierarchical or flat?
3. Centralized or decentralized authority?
  - a. Clear reporting structures or matrix?
4. How do we reward people who do well?
5. What happens when people don't perform well?

## Work Commitment

1. Do we provide flexible work schedules or allow for telecommuting, or do we prefer people to work set hours?
2. Do we expect senior management to be available and accessible after work hours?
3. Are we looking for someone who will be here for a certain number of years or as part of a success

## Office Atmosphere

1. How are our offices set up?
  - a. Open environment? Closed-door offices?
2. How do we dress?
  - a. More formally? Less formally?
3. How do we have fun?

# Guiding Questions for One-on-One Check-ins

## Personal Values, Strength, and Culture

1. What are your personal values? How do they align with our organization's values?
2. What are some of the key pillars of our company culture? What is the culture of your department? How do these align with your personal culture?

## Thought Leadership

1. What have you been writing or reading about related to trends and ideas in your field?
2. How often do you meet with parties outside your organization (competitors, constituents, donors, etc.) who are not directly relevant to your immediate job demands or current operations but can help paint a broader picture? What have you discussed? What did you learn?

## Taking Initiative

1. Tell me about a time when you have pursued an opportunity outside of your prescribed roles and responsibilities. What enabled you to take on this opportunity? What happened? What did you learn?
2. What have you noticed about how we function as an organization? How could we improve?
3. What do you do when you identify an opportunity for organizational improvement?

## Leading Teams

1. What are the biggest challenges you've faced when building a team or collaborative effort? How did you overcome those challenges? Who did you look to for guidance?
2. When you want to collaborate on a project with others across the organization - how do you go about that? Is there a process you use to effectively move others toward a common goal?
3. What skills and perspectives are represented on your teams? How do your teams maintain a culture of inclusiveness?

## Organizational Culture

1. What does a flexible workplace mean to you? How does our organization's workplace culture align with your needs?

# Generating Cultural Norms

## Step-by-step Process:

1. Assemble your organization to participate in a brainstorm session around the key questions listed below. (For larger organizations, consider engaging all employees via survey that asks these key questions.)
2. To effectively answer the questions, utilize the brainstorm rules listed below which encourage equal and engaged participation.
3. Following the brainstorm, identify an individual or team of individuals with strong writing skills to synthesize the brainstorm into 5-8 cultural norms for the organization (see example below.)
4. Publish cultural norms for organization-wide feedback. Upon adoption, visibly display norms and facilitate regular team check-ins to hold team members accountable.

## Brainstorm Rules:

1. One conversation at a time
2. Just give the headline
3. Go for quantity
4. Build on the ideas of others
5. Encourage wild ideas
6. Be visual
7. Stay on topic
8. Defer judgement –no blocking!

## Guiding Questions:

1. What are our expectations around individual work? Team work?
2. How do we make decisions?
3. How do we deliver and receive feedback?
4. How do we manage conflict?
5. How do we celebrate success?
6. Describe your relationships with colleagues.
7. How are people supported to grow and develop?

# Google's Leadership Competencies

The 8 most important qualities of Leadership at Google, in priority order, are as follows:

1. Be a good coach
2. Empower your team and don't micromanage
3. Express interest in your team members' success and well-being
4. Be productive and results-oriented
5. Be a good communicator and listen to your team
6. Help your employees with career development
7. Have a clear vision and strategy for the team
8. Have clear technical skills so you can advise the team

Additional Reading: ["Google's Quest to Be a Better Boss"](#)

# INSIGHTS, IMPLICATIONS, PUZZLES

Insights: What did you learn? What surprised you?

Implications: What does this mean moving forward?

Puzzles: What are you confused about? What needs further exploration?

WHEN: Team Meetings, Client Meetings

WHY: To get feedback from participants about what they are taking away from a conversation-meeting.

HOW:

1. Identify the subject of the conversation (i.e. Meeting, Document)
2. Work through one category at a time. Answer the following questions for each perspective.
  - Insights: What did you learn? What surprised you?
  - Implications: What does this mean moving forward?
  - Puzzles: What are you confused about? What needs further exploration?
3. Facilitate this tool by allowing the group time to write their responses before sharing them out. This provides time to synthesize ideas.
4. Ask participants to share. If time allows, ask participants to identify emerging themes or add additional thoughts.

TROUBLESHOOTING: This tool can also be used as a conversation rather than a written exercise if you are short on time.

LOGISTICS: Timing: 20 Minutes; People: 1 Facilitator

Additional Reading: "Google's Quest to Be a Better Boss"

# How to Work With Me

## A “User’s Manual” to [Insert Name]—

### For best results:

- Pay attention to details. Please please please check your work before you send something to me or a client to ensure that it doesn’t contain any mistakes. Errors in grammar, spelling, formatting, etc. are a big pet peeve of mine. I try to have a sense of humor about it, but I see your work product as a reflection on you, and ultimately on our company, so I will hold you to a very high standard.
- Ask me questions. I love to talk-share my wisdom—whatever you want to call it. More importantly, I think curiosity and inquisitiveness are really valuable and are critical to learning. And if you don’t know something, I’d way rather that you ask me about it than pretend you understand it.
- Don’t email me complex questions. I prefer in-person or phone communication to email, so get over your technophilia (that’s right, I just used the word technophilia) and come talk to me, particularly if you want to discuss something complicated. On the other hand...
- Email me if there is something specific and straightforward you need me to do. My email inbox serves as part of my to-do list, so it’s a good way to ensure I remember to do whatever it is you need me to. It’s also a good idea to talk to me about it in person, though, in case I missed the email, have any questions, or need a nudge.
- Over-communicate with me. Although I am busy and will let you know it, I would way rather over-communicate than under-communicate. Under-communication often leads to mixed signals and/or work not getting done.
- Respect my time. If you need my assistance on something, give me as much lead time as possible so that I can plan accordingly. It’s often a good idea to schedule time with me if you’re going to need more than five minutes. Even when I don’t have a meeting on my calendar, I’m often working on multiple time-sensitive projects, so scheduling in advance is important.
- Don’t rely on me to drive projects you own. If we agree you’re in charge of something, then I’m assuming you’ve got it. Feel free to ask me any questions or let me know if you need anything, but make sure you’re driving the work forward.
- Don’t make the same mistake three times. We all make mistakes; although they bother me, I try to be understanding. I’ll even commit to being understanding the second time. But please don’t make the same mistake three times.

### I am:

- Sarcastic. Sometimes you won’t be able to tell if I’m being serious or not. Sorry, I’m from New York. It comes with the territory.
- Loud. See the New York reference above. I’ll try to be quiet or go into the conference room when I’m on a call, but even then you’ll probably think I’m yelling.
- Overbearing. Again, see the New York reference above. I talk a lot and I interrupt people a lot as well. Sometimes I give people condescending looks. I know these are bad habits and I’m working on shedding them. Feel free to tell me to shove it if I’m being too overbearing.
- Trying to be funny. Sometimes it works, sometimes my jokes fall flat.
- Trying to get my work done from 9am-6pm. I love to laugh, play, and joke around with the team. But sometimes I need to stay really focused because I have well more than nine hours of work and my evening hours are currently occupied hanging out with my wife and son.



## Understanding Leadership Roles and Leadership Styles

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Whatever your position in your business you are a leader. In fact we are all leaders. The misperception that leaders are only those in formal leadership positions fails to recognize the important role of informal power in leadership. This proceedings paper will help you better understand your leadership roles and styles. Each leadership situation poses a unique challenge; you will learn to utilize the best style for each situation.

We begin with a definition of leadership as applied to manager of a farm, agribusiness, horticultural or other business:

Establishing direction, gaining commitment to that direction and increasing individual and team capability to contribute to the direction

To enhance your capacity to lead, we consider the roles of a leader and the power a leader has available. These will then serves as the basis for understanding and utilizing leadership styles.

### Leadership Roles

The following leadership roles are presented from the perspective of the leader of a farm, agribusiness, golf course or other business. For all other leaders most but not necessarily all of the roles will remain important. As you read, open your mind to the enormous potential for leadership:

**The leader as commander.** Think about the captain or commander of a ship. Similarly you have a crucial role as the captain or commander of your dairy farm or agribusiness. The ship's captain steers a course that stays away from dangers such as shallow or turbulent waters and provides a safe and enjoyable journey; you as the dairy farm leader must steer your business in a direction that avoids being blindsided by changes in the dairy and business environment and provides a financial return to the owners and a great place to work for everyone associated with the business your commander responsibilities include understanding the world around you, setting business direction (compelling vision and strategy), fashioning the culture of the business and establishing the rules the business will live by.

**The leader as conductor.** Picture the conductor of a band or an orchestra. He or she must select the right person for each position – a

