Intervenor Services

The future is in your hands

Coaching Resources for Behavioural Competencies
Intervenor Services Human Resource Strategy

2017-2018

Approved February 1, 2018

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INTRODUCTION

The Coaching Resources for Behavioural Competencies was developed by the ISHRS Behavioural Competencies Sub-Committee to support the professional development of intervenors, supervisors and managers, based on the Behavioural Competencies for Intervenor Services. *Please refer to the Intervenor Services Competency Dictionary (January 15, 2016) for the Behavioural Competencies for Intervenor Services, for the roles of intervenor, supervisor and manager.*

The Coaching Resources for Behavioural Competencies includes examples of coaching resources for each of the Behavioural Competencies for Intervenor Services. The Coaching Resources for Behavioural Competencies is intended to be a starting point for agencies to generate further activities and resources and not intended to be an exhaustive resource. It is a professional development resource for intervenors, supervisors, and managers. These coaching resources will also assist managers and supervisors in mentoring, and creating individual action plans to develop behavioural competencies. *Please refer to the Behavioural Competencies Assessment Questionnaire (BCAQ), a tool that can be used to assess competency levels of intervenors, supervisors, and managers.*

This resource includes the behavioural competency models for intervenors, supervisors and managers, from the *Intervenor Services Competency Dictionary*. For each competency the following information is included:

- Definition of the behavioural competency, including competency levels;
- Suggested activities to assist in developing the behavioural competency by level;
- Suggested training related to each behavioural competency; and
- Suggested resources to assist in developing the behavioral competency *(when selecting an activity/resource, consider individual learning styles).*

If you have questions about the *Coaching Resource for Behavioural Competencies*, please contact Amanda Mesko, Interim Chair of the Behavioural Competencies Sub-Committee (2015 – 2018) at a.mesko@deafblindontario.com.

BEHAVIOURAL COMPETENCY MODELS

Table 1 lists the behavioural competencies and target levels identified for success as an intervenor, supervisor and manager. You will notice that for some competencies, there are two target levels, which depend on various factors, including whether you typically work with individuals with acquired versus congenital deafblindness or the particular accountabilities for the role within your agency (e.g. some supervisors have performance management responsibilities, while others do not).

Table 1: Behavioural Competencies and Target Levels for Employees

Behavioural Competencies	Roles		
	Intervenor	Supervisor	Manager
Be Your Best Self focuses on those competencies that are critical to managing and motivating yourself to be the best you can be.			
Act with Integrity	3	4	4
Be Flexible	3	3	4
Commit to Personal Growth and Development	2	3	4
Demonstrate Self-Management and Resilience	4	--	--
Build Bonds focuses on those competencies that are critical to engaging others and growing and maintaining trusting relationships.			
Be Emotionally "In Tune"	3	--	--
Build Trusting Relationships	4	--	--
Engage, Influence and Advocate	3	3	4
Foster Independence and Confidence	4	--	--
Work as a Team	3	4	4
Deliver Excellence focuses on those competencies that are critical to delivering excellent service and achieving the desired results for consumers, families, and the agency.			
Demonstrate Creative Problem Solving and Decision Making	3	3	4
Demonstrate Financial Acumen	--	2/3*	4
Plan and Coordinate	--	3	4
Show Passion, Enthusiasm and Dedication	2	3	4
Lead and Engage Others focuses on those competencies that are critical to inspiring and growing your team.			
Lead and Develop Others	--	3	4
Hold Self and Others Accountable	--	3/4*	4

* depends on the agency and its expectations of the role

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ACT WITH INTEGRITY

The ability to demonstrate and be sensitive to the core values of the profession, the agency, and the sector. It includes using sound ethical judgment in an ethically complex work environment, and interacting respectfully, professionally, and honestly with consumers, families, and the community at large.

LEVEL 1	Demonstrate personal integrity toward core values of the profession and workplace
LEVEL 2	Act consistently with professional values and ethics
LEVEL 3	Act on values and ethics when it is not easy to do so
LEVEL 4	Create an environment that nurtures ethical, professional, and values-based behaviour

This Means...	*This Doesn't Mean...*
• Taking action that is consistent with intervenor sectors values and beliefs in a direct and candid manner that fosters trust	• Reminding others what should be done and then doing the complete opposite or "beating around the bush" to avoid confrontation/conflict
• Conveying compassion and honesty even in difficult situations and being honest with others about potential implications of change	• Taking risks that may be associated with unethical business practices or hedging the truth to avoid potential conflict
• Develops others within the agency and sector to value ethics, standards and fair conduct to ensure the profession remains strong into the future	• Failing to use your authority and experience to set a good example around ethical practice for employees

Activities

LEVEL 1	Demonstrate personal integrity toward core values of the profession and workplace

Get feedback.
- Follow-up with peers/clients after you have been involved in a crisis or difficult assignment where you had to communicate your intentions, openly and honestly;
- Explain your thinking (i.e. what you said and did); and
- Ask for feedback on how you approached the situation.

Admit your mistakes.
- If you have made a mistake or not delivered on a promise, take ownership of the outcome;
- Indicate that it was your responsibility to ensure delivery; and
- State how you will rectify the situation, and when the person can expect delivery.

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Work through "ethical dilemmas."
- Brainstorm with the team the current and potential "ethical dilemmas" you find yourselves in;
- Work through the "correct" answers" to these dilemmas, and the criteria used to determine the most ethical route;
- Use these dilemmas as your moral compass, and hold the team accountable for doing the same.

LEVEL 2 Act consistently with professional values and ethics

Strengthen your confidence by taking a clear stand on difficult or unpopular issues.
- Express your opinion during conversations when it differs from someone else's:
  - Make sure you think about your opinion before you state it; and
  - Maintain the other person's self-esteem – do not tell them that you think they are wrong, but state that your point of view is different, express it, and seek feedback to ensure your opinion was expressed clearly.
- Talk with a colleague who has made a good decision that was initially unpopular:
  - Ask them how they dealt with other people's opposition and how he or she presented arguments in favour of the decision;
  - Incorporate some of the strategies when presenting your own arguments;
  - Practice acknowledging that your stand on an issue may be unpopular with others; and
  - Explain why your point of view should be considered.

Use clear statements of your personal values and code of ethics.
- Try some of the following behaviours:
  - State the behaviours that violate the agency's values;
  - Be willing to admit when you have made a mistake;
  - Periodically ask yourself if you are withholding necessary information;
  - Ask others to give you feedback on their perceptions of your honesty and ethical behavior;
  - Allow your employees to anonymously submit their impressions of your fairness; and
  - Assess whether your behaviour aligns with your personal values and ethics.

If a deliverable is not going to be met, ensure that the impacted groups and individuals are notified promptly.
- Be proactive (not reactive) when you know a commitment to a person who receives support or community partner will not be met
- Talk to the appropriate individuals to find out the impact of non-delivery and agree on mutually beneficial next steps to get deliverables/services back on track.

LEVEL 3   Act on values and ethics when it is not easy to do so

Consciously apply ethical standards and values in your daily decision making. Consider the following guidelines:

- Ask yourself the following questions to consciously apply ethical standards and values in your daily decision making:
  - What are the consequences for the issue in the short and long-term for the team, agency, or sector?
  - Does the situation present a potential risk or danger to employees or people who receive support?
  - Is the reputation of the agency or sector in jeopardy?
  - What advice would you provide if someone else came to you with the same issue?

Spend some time exploring the values and principles that you feel most strongly about. Clearly and firmly express your opinion.

- Write down the most important opinions. Next to each statement, examine whether your behaviour is consistent with these values;
- Ask colleagues to monitor your interactions and determine how consistent you are with your expectation, interactions, principles and performance. Be sure they provide you with specific examples to help you in your development;
- Ask yourself what you would need to do differently in order to live more genuinely and be true to your beliefs;
- Rather than being indirect or backing off during conversation in which various views are discussed, communicate simply and clearly how you feel about the issue;
- If you feel some hesitancy regarding your opinion about a work-related issue, take some time to list the strengths and weaknesses of alternative points of views.
- Carefully review the list, and critically analyze your views in light of all of the pros and cons. After you have resolved and solidified your opinion, discuss your views with others; and
- State your views in a manner that conveys your confidence but does not attack people with different ideas. Disagree tactfully and politely. Have confidence in your ideas and opinions, even if they are unpopular.

Improve the level of genuine and honest feedback you provide to others by practicing giving feedback in positive and constructive ways.

- Focus on the behaviour and not the person to provide genuine feedback, avoid harsh feelings, and the other person feeling like they are being personally attacked;
- Provide specific examples of when the person is particularly effective, and when they are less effective; and
- Ask others to reciprocate. Be open to their feedback, and thank them for their honesty.

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LEVEL 4   **Create an environment that nurtures ethical, professional, and values-based behaviour**

Practice giving honest performance feedback to the team
- Identify their strengths and performance gaps across the team;
- For each gap, ensure that you actually gave clear feedback about the gap; and
- Develop a specific plan to provide constructive feedback. Remember to:
  - Give feedback as close in time as possible to the event
  - Base your feedback on observations
  - Balance constructive feedback with positive feedback
- Focus on the behaviour, not the person, so that you can provide genuine feedback and avoid harsh feelings or perceptions by the other person that they are being "attacked".

Champion a commitment to values and ethical behaviour.
- Treat others with the fairness and honesty that you wish to receive in return;
- Get involved in committees that monitor ethical issues in the sector;
- Start a discussion group or task force to identify ethical issues of consequence;
- Develop a personal set of ethical guidelines for handling sensitive or confidential information; and
- Review the guidelines to align with conduct requirements.

Develop a strategy to face challenging situations with management or other leaders.
- Develop a methodology for discussing controversial issues with management or others in such a way that your point of view is clearly but appropriately communicated (i.e. direct but not disrespectful, hot-headed or belligerent), and apply this methodology to all challenging workplace discussions, regardless of the rank or status of the other participants; and
- Your methodology should include:
  - Reviewing items of agreement with the other party before dealing with disagreements;
  - Considering the reasons for opposing points of views; and
  - Asking the other party for feedback and input about your point of view.

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BE FLEXIBLE

Definition

The ability to adapt to, and work effectively within, a variety of situations and with various individuals or groups. It involves being open to and flexibly responding to different needs and perspectives, as well as easily accepting changes in tasks, responsibilities, or job requirements.

LEVEL 1	Accept the need for flexibility
LEVEL 2	Be responsive in the moment
LEVEL 3	Adapt your approach
LEVEL 4	Adapt overall approach

This Means...	This Doesn't Mean...
• Having an open mind to new and different ways of thinking while accepting others' points of view as valid, and incorporating them into your approach	• Rejecting new ideas or approaches or believing that your opinion is the only correct opinion
• Flexibly applying guidelines or procedures to complete the job, meet client needs, and agency objectives	• Rigorously adhering to agency procedures
• Finding alternatives that will meet the underlying needs of people who receive support and other stakeholders	• Believing your view is the only relevant opinion, ignoring problems, and maintaining your original plan by telling others changes cannot be made

Activities

LEVEL 1	Accept the need for flexibility

Recognize that consumers have very different needs, attitudes, and abilities.
- Spend some time talking to consumers about their backgrounds, work preferences, concerns, and interests.

Practice being flexible.
- The next time you disagree with someone on how something should be done, consider using another person's approach; and
- Make a point of identifying the positive aspects of others' ways of completing tasks.

Talk to people with different viewpoints.
- Intentionally seek people who have different points of view than you;
- Encourage others to express their opinions, and resist the urge to expressing your point of view immediately;

- Ask people more questions to understand what they are thinking, and to appreciate the reasons for their opinions; and
- Try to see the world through another person's view.

| LEVEL 2 | Be responsive in the moment |

Change your approach to finish a job, or meet the team's needs.
- Identify a person(s) who changes their approach in the moment to get a job done, or to meet the team's needs. This could be a professional colleague, or someone in another department of the agency. Observe them at work, and model your behaviour based on what you learn from them.

Respond to change enthusiastically.
- Suppress the desire to complain the next time you are asked to change your work plan;
- Practice adopting a positive attitude, and you will find that the new demands on you will be less stressful; and
- Use this as an opportunity to cling to beliefs about how things "should be" or "used to be" by:
  - Physically changing your frame of reference. For example, sit in a different seat in your next department meeting; and
  - Think positively. Instead of listing all the reasons that something won't work, consider the reasons it could be successful.
- Take personal responsibility for the choices you have by:
  - Daring to be different and open-minded. Ask a colleague to exchange responsibilities for a day, or shift from your normal work routine; and
  - Discuss difficult situations to learn about different alternatives to resolve them.
- Make a point of discussing difficult situations with your manager to learn what could have been done differently; and
- Develop an understanding of alternatives to be better able to respond flexibly in the future.

Think about your own preferences.
- Think about the style of work you prefer, for example:
  - A manager who leaves allows me to be independent versus a manager who works closely with me;
  - Colleagues who work with me/colleagues who complete their work independently;
  - A formal business-like office/an informal office;
  - People who speak very directly/people who are very polite; and
  - Working in a team/working independently
- After thinking about your preferences, consider why some people might prefer the opposite;
- Consider the possible advantages of each option; and
- This exercise will help you recognize the difference between opinions and preferences in a professional environment.

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LEVEL 3 Adapt your approach

Understand the working style of others, adapt your own approach to work most effectively with them, and better meet the needs of the team.
- Participate in assignments or projects with people who have a different working style. Use these opportunities to practice being more flexible. Adapt your approach to best meet the needs of the team.

Practice reaching a compromise.
- Think of any disagreements you have had with a colleague;
- Rather than trying to win the argument, develop flexibility by thinking of a compromise or win-win scenario. Have a discussion with your manager with the explicit goal of finding a satisfactory compromise; and
- If you do not have any disagreements now, think back to an earlier one. See if you can think of a compromise that might have worked in that situation.

When a problematic situation arises that standard policies or practices will not resolve, develop a plan of action that applies the organizational objectives differently than past approaches.
- Recall a situation when you and a colleague/manager approached a situation in different ways;
- Ask yourself what did he/she do differently from you, and what were the outcomes? Is there something you can learn from their approach?
- Find out why they approached that situation in that manner. Think of some of your reasons for your approach. Are there opportunities for you to adapt your approach and tactics based on what you heard?
- Try to use the other person's tactics and suggestions. Try to see their approach as a new and different set of tools to apply and adapt for you to achieve your goals.

LEVEL 4 Adapt overall approach

Identify an opportunity to improve or change a current function, process, or procedure within your department.
- Assess the scope and impact of the intervention;
- Identify the individuals or groups (both internal and external to your own agency) who will be affected by the change;
- Think about how this change will benefit others, as well as the reasons they may have for dismissing the change;
- Work on anticipating different problems that may arise and the approaches you could take to address potential problems. Identify the individuals who need to be involved in the solution and solicit their input and buy-in; and

- Build your business case for the change by preparing a proposal that includes the benefits and obstacles to overcome, a list of required resources, timelines, and return on investment for review by key stakeholders.

Set a personal goal to regularly consider two or more reasonable alternative courses of action for every major decision.
- Are the alternatives unlikely to be used, or are they realistic? Would you ever implement them?
- How creative are your alternatives?
- Keep a record of your thinking by noting the decision and the alternatives and by meeting with your manager to review your progress;
- Recognize that there is rarely only one solution to a problem or only one approach to solving a problem; and
- Review this record occasionally, and set milestones with your manager to assess how flexible you are being.

Volunteer for projects and assignments that involve topics that are new and different from your normal work load or represent new/ground-breaking areas for your department/agency.
- Ask for projects or assignments where existing policies and practices do not apply;
- Discuss with others under what circumstances it would be appropriate not to follow rules or regulations;
- Note the issues and implications of not following rules, and how these areas affect the overall plan or department/agency goal;
- Think of rules or standard operating procedures that have made it difficult to achieve results.

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COMMIT TO PERSONAL GROWTH AND DEVELOPMENT

Definition

The commitment to continually develop and enhance one's personal and professional skills, knowledge, and abilities. This involves regularly reflecting on your performance and abilities, seeking feedback from others (e.g. manager, colleagues, consumers), and acting in light of that feedback.

LEVEL 1	**Work to maintain and develop skills and abilities**
LEVEL 2	**Seek opportunities to learn and improve**
LEVEL 3	**Proactively address development and apply learning**
LEVEL 4	**Model a learning orientation**

This Means...	*This Doesn't Mean...*
• Actively seeking feedback and suggestions as a significant source of learning and improvement.	• Waiting for people who receive support, families or colleagues to provide you with feedback and advice.
• Exploring personal strengths and weaknesses and learning from mistakes	• Generalizing personal shortcomings and viewing them as unchangeable
• Seeking out new information/knowledge to strengthen skills and competencies for further career development	• Being content with what you already know, and restricting yourself to projects similar to ones you have completed before, or relying on a manager/supervisor to provide the information/knowledge you need to advance your career

Activities

LEVEL 1	**Work to maintain and develop skills and abilities**

Attend forums and seminars.
- Attend forums and seminars to exchange ideas and enhance learning opportunities; and
- Select forums, seminars, and training sessions from various areas of the business or even different industries where skills are transferrable.

Join a professional association.
- Join an association outside of your agency that consists of participants from different areas in your field of expertise;
- Try to learn and apply one new approach or idea from each session that you attend; and
- Consider how that new approach or idea could impact the work that you already do.

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Use brainstorming and other techniques.
- Avoid the temptation act on your first idea/solution for an issue or opportunity;
- Invest time brainstorming with others to generate different ideas or solutions; and
- Create a long list of ideas or solutions. Do not evaluate their merit until you have several ideas.

LEVEL 2	Seek opportunities to learn and improve

Get feedback from your manager and peers about your commitment to self-development.
- Solicit feedback on your ability to recognize new and emerging ideas, and apply them to your department/work;
- Determine how you are perceived in this area. For example, are you perceived as a leader or champion in applying new tools and methods?
- Observe people you consider positive models of self-development, and identify what they do to learn and apply new areas of expertise.

Do something dramatically different to improve your ability to learn from a broader perspective.
- Make a conscious effort to expand your professional perspective;
- Read something very different from the material you normally read or participate in a new activity three or four times a year; and
- Think of ideas, approaches, or contacts that might be useful to you or your department to help develop new opportunities.

Purposely seek out opportunities to strengthen your own abilities.
- Read the latest pertinent journals, books, and articles to extend your field-related knowledge;
- Collect information about best practices and key success factors in your industry/service area; and
- Share these benchmarks with your manager on a monthly basis, or during department meetings.

LEVEL 3	Proactively address development and apply learning

Meet with colleagues with a different area of professional expertise.
- Think of a colleague who you consider to be an expert in their field;
- Arrange a meeting with this colleague;
- Prepare a list of questions that you would like to address; and
- Ask them for suggestions on how to increase/expand your abilities in this field.

Apply new techniques and technologies into your work.
- Choose a topic area that is outside your profession, and is of personal interest to you. For example, walk through a bookstore or library and browse through the different sections;
- Develop an understanding of the key ideas or approaches in the area. Write, in bullet point form, a summary of the main concepts to consolidate your learning; and
- Use the theory you summarized and apply it to first time problems. Share your findings with other colleagues.

Develop a personal learning agenda.
- Refer to your long-term (i.e. 3-5 years) career goal(s);
- Keeping your goal(s) in mind, prepare a list of the knowledge and skill areas you will need to acquire. Be as specific and detailed as you can for each area; and
- For each development area, document the steps you will need to take to acquire the necessary knowledge and skill (e.g. formal educational programs, job experiences, etc.). Assign target completion dates for each step. Commit to taking the first step in your personal learning agenda.

LEVEL 4	Model a learning orientation

Look for opportunities in your community to network and develop your expertise.
- Take advantage of any opportunities for networking to gain insight to relevant industry-related issues. For example:
  - Volunteer to serve on the board of an external agency to get a better sense of how other agencies run, and expand your contacts within the community; and
  - Volunteer to be an advisor to a smaller agency which may benefit from your area of expertise.

Facilitate a meeting with colleagues to improve your presentation skills, and share information related to your department's goals.
- Select an unfamiliar topic that benefits you and the agency;
- Develop a presentation to explain and promote your ideas to attendees
- Take note of the discussion that ensues from your presentation. Was the audience engaged? What topics did they respond well to?
- Ask for feedback following your presentation, and make revisions to apply to future presentations.

Volunteer for projects and new initiatives that involve topics that are new and different from your normal mandate, or represent ground-breaking areas for your area of responsibility, where existing policies and practices do not apply.
- Take advantage of this opportunity to experiment with doing things a in a different way, and exploring opportunities from a broad perspective; and

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- Integrate new trends to issues for the first time. Make a conscious effort not to use previous, comfortable ways of completing tasks when completing this initiative.

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Resources

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- Practical Psychology. (2017). How to learn anything faster – 5 tips to increase your learning speed (Feat. Project Better Self). Retrieved from https://www.youtube.com/watch?v=rA2XHWM__yE

Website(s)

- *www.pryor.com* = free webinars on line courses
- https:/beta.charityvillage.com/cms/active-learning = free monthly webinars- Canadian non-profit sector
- https://www.workplacestrategiesformentalhealth.com/job-specific-strategies/strategies-for-supervisor = free webinars for supervisors and managers

Workshop(s)

- Job Concept Designs Workshops – Presentation Skills, Supervise Motivate and Lead Others, Time Management, Communication Skills

DEMONSTRATE SELF-MANAGEMENT AND RESILIENCE

Definition

The ability to display commitment, self-discipline, determination, and enthusiasm despite challenges, setbacks, and in the face of routine or repetitive tasks. It includes bouncing back from disappointments or confrontations and not letting them negatively influence ongoing interactions with others.

LEVEL 1	Stay productive in low stress situations
LEVEL 2	Adapt to higher stress situations
LEVEL 3	Overcome obstacles and challenges
LEVEL 4	Perform at a high level of consistency over a long period of time

This Means...	This Doesn't Mean...
▪ Keeping a positive outlook while delivering high quality work efforts even in the face of mounting pressures	▪ Sacrificing the quality of work or amount of effort because of increasing pressures
▪ Managing your feelings, emotions, and impulses to maintain high levels of motivation and self-confidence	▪ Displaying a negative demeanour and lack of motivation for on-going task when stress levels are high
▪ Maintaining a positive/optimistic view of yourself and confidence in your strengths and abilities at all times	▪ Second guessing your strengths and abilities when confronted with a continued stressful or frustrating situation

Activities

LEVEL 1	Stay productive in low stress situations

Complete a self-reflection resilience checklist
- For the items below, place a checkmark next to the items that demonstrate current strengths, and a plus sign next to the items for which you would like to improve or strengthen, such as:
  - ▪ Keeping on task when presented with repeated rejection/frustration;
  - ▪ Taking time to manage stress effectively;
  - ▪ Staying motivated and keeping a positive disposition under trying conditions;
  - ▪ Showing respect even during challenging times;
  - ▪ Being non-judgmental;
  - ▪ Looking beyond problematic behaviours; and
  - ▪ Using humour/smiling/laughing when faced with a difficult situation.

Accept the fact that doing things we do not enjoy doing is a part of the job.
- When faced with a routine or mundane task that needs your attention, alter the way you have achieved the task previously to add some variety;

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- Regroup and re-evaluate plans you held before to identify procedures that can be altered and procedures which cannot change; and
- Recognize that change is inevitable within the agency, and altering workflow processes can be a positive experience.

Maintain a hopeful outlook when the pressure to deliver is increasing, and nurture a positive view of yourself.
- Adopt an optimistic view of the situation in spite of challenges;
- Focus on possibilities rather than loss or disappointment;
- Use positive affirmations to help build confidence in your ability to overcome obstacles and/or situations;
- Visualize what you want to achieve to help guide your outlook; and
- Recognize that each step toward achieving a goal (no matter how small) can reinforce trust in your instincts and abilities.

| LEVEL 2 | Adapt to higher stress situations |

Assessing implications and possibilities
- During adversity, many people become preoccupied with what will happen next;
- Consider a recent or current adversity when you began to fear the worst; and
- Review the adversity and list the:
  - Worst case implications (your most catastrophic beliefs);
  - Most likely implications (between worst and best); and
  - Best case possibilities (the most positive outcomes you can dream of).

Take care of yourself to deliver consistent results for your department/agency into the future.
- Taking care of yourself helps keep your mind and body primed for dealing with situations that require resilience;
- Do not neglect paying attention to your personal needs and feelings;
- Engage in activities that you enjoy and find relaxing; and
- Exercise regularly and eat a healthy diet.

Identify and purge toxic thoughts.
- Identify an adversity you are currently experiencing by doing the following:
  - Think about any toxic thoughts you are having related to adversity; write them on a piece of paper; and
  - Review each toxic thought, and reframe your thinking by identifying alternative resilient thoughts. For example, "I'm the worst manager in the world. I can't get my staff to listen to me." Alternatively, consider this example, "I'm not managing effectively because I have not truly made an effort to get to know the team as individuals. I will meet with everyone separately before the end of the month to get better results."

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LEVEL 3　　Overcome obstacles and challenges

Avoid seeing a crisis as insurmountable.
- When faced with a crisis, break down the problem to identify the underlying obstacles and constraints;
- From the list, classify which obstacles and constraints are within your control versus those that are not;
- Recognize that you cannot prevent all bad things from happening, but you can alter the way you interpret and respond to them; and
- Revisit the crisis again with a clear focus on what needs to be done to successfully address the challenge.

Draw a stress buffer shield to think about resilience and establish strategies for dealing with stress

Using the diagram below as an example, draw your own stress buffer shield to identify your own personal store of constructive coping skills.

Life experiences that have strengthened me:	My support network of people who encourage me:
Attitudes/Beliefs that help protect me:	Physical self-care habits that prepare me or help me release tension:

Action skills I can use to change the situation:

Record your own stress buffers in the appropriate sections of the shield:

- Life experiences that have strengthened me;
- My support network of people who encourage and help me;
- Attitudes/beliefs that help protect me;
- Physical self-care habits that prepare me or help me release tension; and
- Action skills I can use to change the situation.

Make connections to help you during difficult times.
- Develop a supportive network of trusted colleagues, family, and friends who know you well;
- Accept help from your network graciously when pressures mount; and
- Become involved in the community; do something to help you reclaim hope, and get a different perspective on your unfavourable circumstances.

LEVEL 4   **Perform at a high level of consistency over a long period of time**

Develop a system to keep track of your commitments and follow through.
- Evaluate your ability to follow through before making commitments to others;
- Resist the tendency to make commitments in order to buy more time or keep others from harassing you – failure to follow through on promises and commitments can lead to a loss of credibility and conflict;
- Keep a list of all of the commitments or promises you have made to others. Some commitments may seem insignificant, but are extremely important to the other individual/group (e.g. forward an article, initiate a phone call, bring a book from home to work);
- Set a date by when you will follow through on the commitment or accomplish the task;
- Check off those tasks you have completed, and assess the extent to which you deliver on these commitments/promises;

- Reflect on a couple of situations when you failed to follow through on your commitments. Examine the nature of the commitment and the reasons why you were unable to fulfill that particular commitment (e.g. low priority, poor planning, forgot);
- Ask yourself what you could have done differently, and incorporate this new information into your planning and scheduling to avoid future conflicts. Consider the following:
  - What are the reasons that you made the commitments in the first place (e.g. to avoid harsh feelings, to escape pressure, to buy time, etc.); and
  - Do you notice any trends about your motives and reasoning when accepting commitments that you do not fulfill?
- Use this information to build strategies to guard against failing to deliver on your commitments.

Develop realistic goals focused on meeting a challenge rather than obstacles or constraints.
- When faced with a challenging situation within your department or agency, remember to set realistic and attainable goals;
- When faced with obstacle look for something familiar to complete (e.g. part of a usual routine in order to boost your morale and self-confidence); and
- After finishing something, build off of the accomplishment to address other obstacles or constraints contributing to the larger problem.

Continually seek out opportunities for self-discovery over the long-term.
- After weathering a difficult time or challenging situation, it can be very beneficial to reflect back on the valuable lessons learned about ourselves;
- Reflect on the following:
  - How have you grown as an individual because of the struggles you have experienced?
  - Have any of your personal relationships been deepened?
  - Do you have a greater sense of personal strength, or an increased sense of self-worth?
  - Are you more in touch with your spirituality and do you have a greater appreciation for life?

Education/Credit Course(s)

- (Strategic) Mindfulness and Resilience, Queen's University Executive Education, Smith School of Business, https://smith.queensu.ca/ConversionDocs/Execdev/short_term_program/building%20resilience.pdf

Training

- CDBA ON. Enhancing Coping Skills.
- CDBA ON. Health, Wellness & Aging.

Resources

Book(s)

- Resilience: Reflections on the Burdens and Gifts of Facing Life's Adversities by Elizabeth Edwards (Broadway, 2009)
- Resilience, by Boris Cyrulnik (Penguin UK, 2009)
- The Resilience Factor: 7 Keys to Finding Your Inner Strength and Overcoming Life's Hurdles (Paperback), by Karen Reivich & Andrew Shatte (Broadway, 2003)
- Researching Resilience (Paperback), by Linda Liebenberg & Michael Ungar (University of Toronto Press, 2009)
- Handbook of Adult Resilience, by John W. Reich PhD, Alex J. Zautra PhD, and John Stuart Hall PhD (The Guilford Press,2010)
- Mental Resilience the Power Of Clarity: How to Develop the Focus Of a Warrior and the Peace Of a Monk, by Kamal Sharma (New World Library, 2008)
- Building Personal and Organizational Resilience, by HARVARD BUSINESS REVIEW (Mc-Graw Hill Europe, 2003)
- Chicken Soup for the Recovering Soul: Your Personal, Portable Support Group with Stories of Healing, Hope, Love and Resilience, by Jack Canfield, Theresa Peluso, Peter Vegso, and Robert Ackerman (HCI, 2004)

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Workshop(s)

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BE EMOTIONALLY IN TUNE

Definition

The ability to tune in to the needs, perspectives, and sensitivities of others (e.g. team, consumers), and act with these in mind. It involves active listening, truly understanding, accepting, and respecting the feelings and perspectives of others, and using this understanding to respond appropriately.

LEVEL 1	Pay attention to others
LEVEL 2	Understand behaviour
LEVEL 3	Demonstrate empathy
LEVEL 4	Be emotionally "in tune"

This Means...	This Doesn't Mean...
▪ Seeking first to understand, then be understood; deferring judgment on what someone is saying, instead of focusing on finding out more	▪ Jumping in with a solution or dismissing a person when they express their concern, and move on to the next point
▪ Demonstrating interest when someone mentions an issue that concerns them; recognizing and understanding non-verbal behaviour (e.g. eye contact and body posture)	▪ Half-heartedly addressing an issue that has been raised; accepting what is said without considering non-verbal cues
▪ Exploring the surrounding environment, and the impact on an individual's behavior	▪ Ignoring the interrelationships between the individual, culture, community, and past experiences

Activities

LEVEL 1	Pay attention to others

Ask clarifying questions.
- Learn to ask clarifying questions of others. This enables you to gather important information, and conveys you are interested in what they are saying;
- Consciously increase the number of open-ended questions and probes you use in conversations for the next month to draw out the needs/interests/concerns/objectives of others for the next month;
- Monitor the number of open-ended questions or probes (e.g. "What do you think about...? Why did you feel that? How would you have approached...? Tell me more about...) you use with others over a one-day period;
- Pay attention to the difference in reactions you get from others when you use open-ended or (i.e. yes or no) questions; and
- Assess your progress in using the above tactics by answering the following questions:

- Has it led to greater understanding of team members?
- Has it led to greater understanding of people who receive support?

Identify someone who has strong interpersonal relationships. Arrange to spend some time observing what they do or say to develop and maintain them.
- After an interaction with a person who receives support or colleague, ask the individual what he or she was thinking during the conversation; and
- Try to use the same sort of reasoning in your next interaction, and monitor the other person's response to it.

Pay attention to others' non-verbal cues during your next conversation.
- The next time you have an opportunity, watch people communicate. Try to determine the emotions they are communicating that may not come across in their words alone. Some common non-verbal cues are:
  - Arms or legs crossed (this typically indicates anger, withdrawal or resistance);
  - Facial expressions (this typically indicates different emotions depending on the exact expression);
  - Hands folded (this typically indicates thinking, weighing of alternatives); and
  - Lack of eye contact (this typically indicates detachment, boredom, fear).
- After a conversation, assess whether you were paying attention to non-verbal cues and try to determine whether your interpretation of them was accurate.

Note: Remember that these non-verbal cues are only examples, and do not universally apply. People of different backgrounds may be sending different messages with the same non-verbal behaviours. Validate your initial assessments with the individual before acting on them.

LEVEL 2	Understand behaviour

Ask your manager/supervisor or colleagues to observe your behaviour when obtaining important information from others in the agency.
- Ask for feedback on your interpersonal relations. Ensure that the feedback refers to a specific behaviour or example of something that you did or said to demonstrate the competency effectively or ineffectively; and
- Ask your manager/supervisor what you could have done differently. Make sure he or she clearly explains the reasons for their suggestions.

Keep a log of situations where you felt you demonstrated effective interpersonal relations and respect skills.

- Pay particular attention to critical incidents that provided opportunities for you to identify underlying concerns that are not explicitly stated by others or hear the emotions that accompany an expressed statement. After doing this for a few months, review what you have written to gain insight into your interpersonal relations skills;
- Pay special attention to situations when someone approached you to express his or her feelings. (For example, did you feel too busy to talk, and/or brush the person off?
- Reflect on the situations to identify where you could have listened more actively. For example, were there any situations when you were feeling pressured by time, and did not listen as well as you could have?

Increase your use of paraphrasing in conversations; however, use this tactic in an effort to understand versus to be understood.

- Practice using paraphrasing as a way to check your understanding of what the other person is saying;
- Monitor the number of times you use paraphrasing in conversations with others (e.g. rephrasing another person's ideas, facts and/or feelings and feeding it back to check understanding);
- Consciously increase the number of times you paraphrase in conversations for the next month. Be conscious of not interrupting others during this time; and
- To effectively paraphrase, be sure to:
  - Use a questioning tone (rather than asserting that you already know;
  - Be careful not to alter their words to suit your meaning (this is a technique for arguing, not listening);
  - Be conscious not to interrupt others; and
  - Observe how the person you are speaking with reacts to how you paraphrased what they said.

LEVEL 3	Demonstrate empathy

Try to understand a point of view that is different from your own.

- After an interaction with a person who disagreed with your position, try to appreciate their perspective. Imagine what that person was thinking or feeling at the time.;
- Think about how your interpersonal relations skills contributed to both positive and negative feelings the person might be experiencing. Document what you would do differently to make the interaction more positive, and use that information to develop a plan for the next time you interact with that person;
- Listen and determine whether you can summarize their concerns. Repeat their concerns to confirm you heard them correctly. Ask for further details on particularly important or innovative points; and

- Do not try to solve others' problems by offering a solution or your judgment of their opinions. Instead, try to make them feel that you understand their concerns, and can see the situation from their point of view.

Consider the inferences you make about others.
- Create a log that includes some implicit inferences about people, and their views that go beyond the explicit content and emotion outwardly demonstrated;
- Ask people, if appropriate, if your view of their underlying views, feelings was correct;
- Use your communication skills to determine what is contributing to, or hindering, a colleague's ability to make choices;
- Speak to a colleague who has made a complaint or asked for assistance;
- Discuss a list of options that would benefit your colleague. Try to identify the issues which are most important to him/her. Use this information to move toward narrowing the list of options;
- Find out the nature of the person's issue, and his/her expectations. Reflect on whether you need additional information to understand the underlying issues or context.
- Paraphrase your colleague's issue and need to ensure that you have understood them; and
- Throughout these discussions, try to understand your colleague's strengths, weaknesses, and deeper feelings by being open-minded about their perspective.

Adjust your communication style to best fit the individual based on their style, background, or position.
- Identify a situation where you had to modify your communication approach to fit the individual;
- Outline the nature of the situation and the approach you used by answering the following questions:
  - Why was it effective or not effective?
  - What worked and why?
  - What would you have changed?
- Identify a current or future situation in which you will have to adjust your communication style to fit the individual;
- Determine your approach using information from your analysis; and
- Try to identify the unspoken concerns or feelings that would allow you to be more sensitive to the individual's needs, and also presenting a compelling/persuasive message to the individual.

LEVEL 4	Be emotionally "in tune"

Practice your ability to assess and provide feedback of underlying concerns and feelings in a group.
- Identify an upcoming meeting or activity you will be attending where there is likely to be disagreements or potential conflict.
- During the meeting, make a conscious effort to:
  - Listen to what is being said without immediately responding;
  - Observe the body language of individuals in the group;

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- Note who is talking and not talking; and
- Determine if the messages being expressed are more important than what is being said.
- Based on your observations, determine what you believe to be the underlying root problems or issues driving the behaviour of the group; and
- Express your observations to the group, and assist them in resolving the issue(s).

Explore with the team what they are thinking and feeling and resolve to make changes.
- Ask the team what they are thinking or how they are feeling about current situations related to work volumes, policy changes, technology changes, events, etc.;
- Probe to uncover their perceptions regarding the issue, as well as their personal thoughts and feelings, with caution. Probe further to identify any underlying issues that might be influencing each individual; and
- Ask for recommendations, where appropriate, within identified constraints (e.g. budget and staffing levels).

Make a consistent effort to fully appreciate the perspectives of others.
- Make a routine (i.e. once a week) of casually visiting and walking through your department, the agency, and the community. Use the opportunity to gather information, such as:.
  - Ask open-ended questions to test assumptions; focus r questions as much as possible on the needs of the individuals you meet along the way (e.g. how things are going, what difficulties are being encountered, what has changed over time and what, if anything, you can do to help);
  - Restate and/or summarize what you hear, where appropriate, to show that you are listening and understanding their needs; and
  - Focus not only on the individual, but on the circumstances surrounding the individual which may explain their behaviours.
- Make brief written summaries of each individual's expressed concerns, and use this knowledge to follow up on them during future visits.

<div align="center">

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- Working With Emotional Intelligence, by Daniel Goleman (Bantam Books Canada, 2000).
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- Mental Health Issues (Intro) (e.g. Trainer – Louis Busch: louis.busch@camh.ca)

BUILD TRUSTING RELATIONSHIPS

The ability to establish and maintain bonds and trusting relationships with individuals while maintaining professional boundaries.

The ability to establish and maintain bonds and trusting relationships with individuals, while maintaining professional boundaries.

LEVEL 1	Build rapport
LEVEL 2	Build bonds
LEVEL 3	Develop trusting relationships
LEVEL 4	Facilitate relationship building

This Means...	*This Doesn't Mean...*
• Making a conscious effort to understand differences and establish common interests with your contacts	• Networking without a purpose
• Developing trusting and productive relationships to secure and build on future opportunities for the agency	• Focusing on the short-term with a consumer to build immediate support without considering the long-term impact. This may include ignoring ideas of multiple consumers, and showing little flexibility to changing needs
• Building and nurturing relationships internally and externally that may directly impact your agency	• Connecting with others only when you need to solve a problem or get information

Activities

LEVEL 1	Build rapport

Take an external course to improve your knowledge and communication.
- Seek opportunities to take a community college or university course either in your own or related area of expertise; and
- Include new learnings into your work.

Learn as much as you can about the consumers' needs.
- Research prior mandates related to your current mandate and uncover the similarities/differences;

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- Share your findings with your network in an effort to build meaningful information exchanges, as well as grow and enhance the partnership; and
- Learn as much as you can about your network, and encourage your team/colleagues to interact with their networks professionally and socially as appropriate.

Monitor issues and concerns affecting the individuals receiving support.
- Be aware of the individual's broader issues;
- Talk to them about their business, not just the services or projects you have a mandate to deliver;
- Keep up-to-date with what is happening in the broader sector by talking to consumers regularly, reading business magazines and publications, meeting with other colleagues, and talking to each individual about critical short-term and long-term issues Impacting them; and
- Act as a sounding board for individuals receiving support.

LEVEL 2	Build bonds

Understand the consumer's point of view and share this knowledge with your network.
- After an interaction with the individual, try to imagine what they were feeling or thinking during your interaction with them;
- Think about how what you did influenced that person, positively or negatively;
- Document what you would do differently next time to make the interaction more positive; and
- Share this information with others in your network who would benefit from it before the next time they interact with the same consumer.

Be visible, accessible, and stay in contact with the individuals and groups within your network.
- Find ways to keep in regular contact with individuals and groups who may be of future value to the agency and/or the sector.
- Maintain contact even when you are not directly working with these individuals on a current mandate. (i.e., you may have come across some information that may be of use and value to them).

Identify important relationships and make an effort to serve as an ongoing resource to these individuals and/or groups.
- Every time you read an article or book, or come into contact with information you find interesting or useful, ask yourself if anyone in your network might be interested in the same information;
- Make copies of the information and share it with people who may be interested; and
- Follow up on the information as a reason to talk and strengthen the relationship to draw upon it in the future.

LEVEL 3	Develop trusting relationships

Target relationship and network building based on consumer insight.
- Build a plan for long-term relationship building. Consider your long-term strategic goals, and your own role in realizing them, such as:
  - Identify the need for support, and the sources of support;
  - Identify the key people who will be important to you in the future;
  - Plan to initiate and strengthen your relationship with them over time; and
  - Focus initially on building rapport with them.
- Think about your agency and the community it serves by:
  - Identifying the individuals to create relationships with;
  - Creating a plan for getting to know these individuals; and
  - Speaking with colleagues who have experience in establishing relationships key influencers in the community.
- Create a list of these key influencers, and make it a priority to get to know them, and integrate them into your network.

Spend time talking with your colleagues about individuals who are good at building and leveraging collaborative networks.
- Use real life examples of excellence; describe the skills and behaviours the person demonstrated;
- Talk about the value of building and leveraging collaborative networks brings to the agency;
- Describe how building and leveraging collaborative networks makes a difference to your personal success; and
- Identify and discuss the consequences of not having good building and leveraging collaborative networks skills.

Keep regular contacts.
- Make sure you stay in contact with the people you have met through conferences, meetings, and community visits;
- Meet regularly to find out what is going on within your area/region, as well as any social, economic, or political forces that will impact the organization;
- Lean on this network to discuss new opportunities, initiatives, and approaches within the sector; and
- Review your achievements and challenges.

LEVEL 4 Facilitate relationship building

Leverage an existing relationship to develop further collaborative connections.
- Ask this individual to identify and introduce you to other influential people within his or her network;
- Plan a meeting with your contact to be introduced to these new people;
- Find common ground and topics to discuss with the individuals;
- Look for opportunities during the course of the conversation to demonstrate how you help each other moving forward; and
- Expand your network by trying to add one new connection to your network on a monthly basis over the next 6 months.

Actively build and form new partnerships/networks to benefit the agency, and achieve its goals.
- Do not hesitate to establish a new network of associates to gain support for new initiatives within the agency based on individuals' needs;
- Use your expertise and contacts to approach others, and help deliver the services your agency provides; and
- Take the time to form new partnerships/networks where you feel they will be the most beneficial. Both parties need to benefit from the relationship so that the overall mandate is best served and mutual goals achieved.

Capitalize on your trusted advisor status within your networks to meet the emerging and future needs of people who receive support.
- Leverage your reputation within your collaborative networks to champion long-term strategies for all stakeholders;
- Offer the perspective of your thinking, and share your experiences around situations you have previously faced to prepare for the future; and
- Offer to coach members of your network in how to adequately plan, prepare, and implement possible solutions to long-term issues.

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Training
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- Creating Professional Boundaries, Sherry Baron

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Resources
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Book(s)
- The Speed of Trust: The One Thing That Changes Everything, by Stephen M.R. Covey with Rebecca Merrill (Free Press, 2008)
- How to Win Friends and Influence People in the Digital Age, by Dale Carnegie & Associates (Simon & Schuster, 2012)
- The Frog Prince: Secrets of Positive Networking, by Darcy Rezac (Frog & Prince Network Corp., 2003).

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- Leading Beyond the Walls: Wisdom to Action Series (The Peter F. Drucker Foundation for Nonprofit Management), by Frances Hesselbein, Marshall Goldsmith & Iain Somerville (John Wiley & Sons, 2001).
- Managing Strategic Relationships: The Key to Business Success, by Leonard Greenhalgh (The Free Press, 2001).
- Networking: Building Relationships and Opportunities for Success, by Melissa Giovagnoli & Jocelyn Carter-Miller (Jossey-Bass Publishers, 2000).
- Networking Smart: How to Build Relationships for Personal and Organizational Success, by Wayne E. Baker (New Edition: Backinprint.com, 2000; Original: McGraw-Hill, 1993).
- How to Win Friends and Influence People, by Dale Carnegie (New Edition: Pocket, 1998; Original: Simon & Schuster Trade, 1981).

Movie(s)

- The video, "Another Look: Defining Respect in Healthcare", by VisionPoint Productions Inc. (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- The video "Relationship Strategies Course", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Video(s)

- Sinek, S. (2011). TEDxMaastricht. First why and then trust. Retrieved from: https://www.youtube.com/watch?v=4VdO7LuoBzM

Other

- Turf, Trust, Co-Creation and Collective Impact by Liz Weaver, Tamarack Institute (2017)

Turf Trust and
Co-Creation Paper.pdf

ENGAGE, INFLUENCE AND ADVOCATE

Definition

The ability to encourage or influence others (e.g. consumers team members, community partners, government) to motivate or gain their commitment and support. It involves giving a voice to those who cannot speak for themselves to communicate their needs, and enabling others to self-advocate.

LEVEL 1	Encourage others using a single approach
LEVEL 2	Adapt your approach to the individual, group or situation
LEVEL 3	Carefully plan your approach
LEVEL 4	Advocate for the needs of consumers

This Means...	This Doesn't Mean...
• Considering the point of view of the other people involved so that you will know how to	• Clearly communicating your own point of view, and blaming the other person if they do not respond as you would like
• Building support for your position over time by developing relationships, testing ideas, and finding allies	• Being so concerned about the value that you see in your position that you neglect others' concerns or feedback
• Drawing on a variety of people, including outside experts, to create a foundation for getting your ideas accepted	• Working to convince a group of colleagues by relying exclusively on facts and logic in your arguments

Activities

LEVEL 1	Encourage others using a single approach

Develop your public speaking skills to better persuade others.
- Record yourself next time you make a group presentation; ask for the group's permission before you tape the session;
- Review the tape and ask yourself the following questions:
  - Did the tone and pattern of my voice match my words and the meaning I was attempting to convey?
  - Did the pace of my speaking make communication clear?
  - Did I use a level of language that was appropriate to my audience (e.g. did I use unnecessary technical jargon that my audience might not have understood?)?
  - Could I have said or done anything differently to make my presentation more powerful and persuasive?

Do a trial run before presenting an important issue or idea.

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- If you do not know how people will react to a planned idea or proposal, do not be afraid to ask a few team members first; and
- Take note of their response, and plan how you will adjust or reframe your proposal to have the intended impact.

Think about the process of getting to the result, not just the end result.
- Do not let your eagerness to achieve a certain result be a barrier to achieving it; and
- When people seem reluctant to support a good idea. Focus on the process, which will put you on the right track to think about the people involved, and how you need to persuade or influence them.

LEVEL 2	Adapt your approach to the individual, group or situation

For any given initiative, develop a multiple action plans.
- Identify alternative actions/tactics for gaining approval;
- Determine alternative resources;
- Consider the costs and benefits of not taking any action; and
- Consider all the positives and negatives of the course of action you are recommending.

Create a flowchart of your presentation/information.
- Think about the information you want to present or communicate to your audience. Determine if the information flows logically;
- Start with your more general points, and then provide more specific details;
- Once you have created the flowchart, review it to ensure that you have not missed any steps which may be critical to your audience's understanding; and
- Rehearse your presentation and think about the connections you may need your audience to make to gain their agreement. Once you have identified which connections are most critical, you can plan a couple of different ways of helping your audience make these connections.

Observe other people who you feel are skilled in advocating for or influencing others.
- Ask for guidance from your colleagues on how you might improve your advocating and influencing abilities;
- Before observing others, consider which techniques you use most frequently, and the degree of success that you achieve with each of them;
- Ask questions to understand why they chose the activities/techniques they did. Ask questions about techniques they chose not to use, such as why were those not appropriate for this situation?
- Identify the activities or techniques they use to encourage people to follow a course of action; and
- Make a list of the techniques/actions the individual uses during your period of observation; discuss this list with the person.

LEVEL 3 Carefully plan your approach

Adjust your communication style to best fit the individual based on their style, background, or position.
- Ask a manager to identify a situation where they had to modify their communication style to fit an individual;
- Have him/her outline the nature of the situation and the approach they used by asking the following questions:
  - Why was it effective or not effective?
  - What worked well and why?
  - What could they have done differently?
- Identify a current or future situation that you will have to adapt your communication style to fit an individual; and
- Determine your approach using information from your conversations with your manager. Pay attention to unspoken concerns to ensure you have a complete understanding of the individual's needs.

Develop your negotiating style with others by following this exercise:
- Identify an opportunity to negotiate an issue with someone;
- Consider your usual or typical negotiating style based on one of the categories below. Answer the questions honestly during the assessment:
  - **Win/Lose:** where you typically see yourself winning, and the other party losing in the process;
  - **Lose/Lose:** where you typically see yourself, and the other party losing in the process;
  - **Lose/Win**: where you typically see yourself losing, or giving in during the process; and
  - **Win/Win:** where you typically see yourself, and the other party being satisfied with the outcome of the process.
- Think about the other party's position. What will his or her key points be? How will you respond?
- Meet with someone whose negotiating skills you would classify as win/win, and focus of the following:
  - With this person, review the current situation and your typical approach to negotiating;
  - Ask how you and the other party can move closer to a "win/win" agreement;
  - Practice the negotiation;
  - Meet with the other person(s) to negotiate, using the feedback you received during your conversation;
  - Find a goal which both you and the other person can agree and focus on, and maintain the focus on the common objective; and

▪ Monitor your own thoughts and feelings throughout the discussion. Note the reactions you are having to what the other person says. Use this information to help you manage the negotiation process.

Carefully plan your influencing strategy.
- When trying to advocate for or persuade someone, take into account his/her background and perspective;
- Think about his or her needs and issues;
- Tailor your arguments to others rather than to what is important to you;
- Present your solutions in a logical order from the least important point to most critical;
- Reiterate how you have taken into account the listener's perspective before finishing your presentation;
- Customize your data or information for the audience;
- When you use data or information to substantiate your position on something, make sure that it addresses issues that interest your audience;
- Remember to emphasize how the information you use addresses their specific interests; and
- Carefully select the appropriate communication method to make a positive impact. For example, is an email followed by a phone call appropriate, or should the interaction be in-person?

LEVEL 4	Advocate for the needs of consumers

Analyze your audience before a presentation to win support from others. Consider the following:
- What are the main questions or concerns your audience has? List these concerns.
- Identify two or three of the benefits for your audience;
- Speak to other people who may know how you can get your ideas accepted by your audience;
- Anticipate the objections or arguments your audience will have; and
- Document two possible responses for each objection or argument.
  - ▪ Provide a brief overview of the information you will be presenting before you discuss your main ideas;
  - ▪ After the presentation, think of additional actions you could have taken to have improved the outcome, even if the presentation was well received; and
- ▪ Follow up on these actions, if possible. If not, commit yourself to using them in your next presentation or discussion.

Learn to influence through others.
- Lay the groundwork for presentations or important meetings by meeting with key stakeholders who will need to be influenced. This will help you gain a keener insight into any particular objections or resistance that exists, so you can address these issues thoroughly instead of having to address them in the moment; and

- Identify key influencers affecting you and your area. Assess the quality of your relationships with them and, where necessary, develop a plan to improve particular relationships. Think about ways you can leverage them to further impact the work that you do.

In the face of resistance, use your strengths to your advantage.
- Document the names of each of the individuals who presently support your idea, and those who do not support it;
- Solicit the assistance of those who support your idea in persuading the others. This may include asking them to speak directly to people with different views, or asking for their suggestions for the best way to persuade them; and
- If some opponents to the idea cannot be persuaded in this manner, identify individuals not involved in the decision who have strong relationships with the opponents. Solicit the same assistance from them.

Education/Credit Course(s)

- Negotiations and Consensus Building, Queen's University Executive Education, Smith School of Business,
  https://smith.queensu.ca/ConversionDocs/Execdev/short_term_program/negotiating_and_con sensus_building.pdf

Resources

Book(s)

- Difficult Conversations: How to Discuss What Matters Most, by Douglas Stone, Bruce Patton and Sheila Heen (10th Anniversary Edition, 2010; The Penguin Group, 1999)
- Getting to Yes: Negotiating Agreement Without Giving In, by Roger Fisher and William L. Ury (Penguin Publishing Group, 2011; Penguin Books, 1994).
- The Power of Persuasion: How We're Bought and Sold, by Robert V. Levine (John Wiley & Sons, 2006).
- Presenting to Win: The Art of Telling Your Story, by Jerry Weissman, (New Edition: Prentice Hall, 2006; Original: Financial Times Prentice Hall, 2003).
- The Story Factor: Inspiration, Influence, and Persuasion through the Art of Storytelling, by Annette Simmons (New Edition: Basic Books, 2006; Original: Basic Books, 2002).
- **Influence without Authority, by Allan R. Cohen and David L. Bradford (John Wiley and Sons, 2005).**
- Leadership, by Rudolph W. Giuliani (New Edition: Hyperion, 2005; Original: Talk Miramax Books, 2002).
- Changing Minds: The Art and Science of Changing Our Own and Other People's Minds, by Howard Gardner (Harvard Business School Press, 2004).
- Face to Face Communications for Clarity and Impact, by Harvard Business School Press Staff (Edited by Harvard Business School Press, 2004).

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- How To Prepare, Stage, and Deliver Winning Presentations, by Thomas Leech (New Edition: AMACOM, 2004; Original: AMACOM, 1993).
- Brag! The Art of Tooting Your Own Horn Without Blowing It, by Peggy Klaus (Warner Books, 2003).
- Franklin and Winston: An Intimate Portrait of an Epic Friendship (John Meacham, 2003).
- Leading Out Loud, by Terry Pearce (New Edition: John Wiley & Sons, 2003; Original: Jossey-Bass Publishers, 1995).
- Talk Your Way to the Top: How to Address Any Audience Like Your Career Depends on It, by Kevin R. Daley, Laura Daley-Caravella, (McGraw- Hill Trade, 2003).
- Maxwell 3-in-1: The Winning Attitude, Developing the Leaders Around You, Becoming a Person of Influence, by John C. Maxwell (Thomas Nelson, Inc., 2003).
- Words That Change Minds, by Shelle Rose Charvet (New Edition: Success Strategies, Inc., 2003; Original: Kendall/Hunt Publishing Company, 1997).
- Working the Room: How to Move People to Action through Audience-Centered Speaking, by Nick Morgan (Harvard Business School Press, 2003).
- Crucial Conversations: Tools for Talking When Stakes are High, by Kerry Patterson, Joseph Grenny and Ron McMillan (McGraw-Hill, 2002).
- The Power of Corporate Communication: Crafting the Voice and Image of Your Business, by P.A. Argenti and J. Forman (McGraw-Hill, 2002).
- Getting Things Done When You Are Not in Charge, by Geoffrey M. Bellman (2nd Edition: Berrett-Koehler Publishers, 2001; Original: Berrett-Koehler Publishers, 1993).
- The Influence Edge: How to Persuade Others to Help You Achieve Your Goals, by Alan Vengal (Berett-Koehler Publishers, 2001).
- The Power of Indirect Influence, by J.C. Tingley (AMACOM, 2001).
- The Persuasion Handbook: Developments in Theory and Practice, by James Price Dillard and Michael Pfau (Sage Publications, 2001).
- Say it With Charts: The Executive's Guide to Visual Communication, by Gene Zelazny (McGraw-Hill Trade, 2001).
- Winning 'Em Over: A New Model for Managing in the Age of Persuasion, by Jay A. Conger (Simon and Shuster, 2001).
- Exercising Influence: A Guide for Making Things Happen at Work, at Home, and in Your Community, by B. Kim Barnes (Barnes & Conti Associates, Inc., 2000).

Video(s)
- "Conveying Information", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Exercising Personal Power", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Getting to Yes – Video Workshop", by Learncom (International Tele-Film, 1-800-561-4300, www.itf.ca).

- "I Wasn't Prepared For That", by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Stand and Deliver", by Mind Resources (International Tele-Film, 1-800-561-4300, www.itf.ca).
- Ted Talks. Simon Sinek. (2010). How great leaders inspire action. Retrieved from: https://www.youtube.com/watch?v=qp0HIF3SfI4

Workshop(s)

- DBCO. (2013-2014). Intervenor Symposium. DB Culture- 1.5 hours- Jasmin Simpson
- DBCO. (2013-2014). Intervenor Symposium. DB Cultural History- John Lee Clark
- DBCO. (2013-2014). Intervenor Symposium. Sexuality- Fran Odette or Javier Romero
- Cultural Aspects of DB- Maricar Marquez DBCO. (2013-2014). Intervenor Symposium. DB Culture- 1.5 hours- Jasmin Simpson
- David Hinsberger- Vita Community Living - Self Advocacy and Abuse Prevention

FOSTER INDEPENDENCE AND CONFIDENCE

The ability to enable and empower consumers to build their confidence and self-esteem and achieve their highest potential, based on the "do with, not for" philosophy. It involves promoting their social and personal development, encouraging their independent/life skills, and facilitating their communication and interaction with the world around them to help "redefine the possible."

LEVEL 1	Provide encouragement
LEVEL 2	Provide training and support
LEVEL 3	Build competence and confidence
LEVEL 4	Fully empower individuals

This Means...	This Doesn't Mean...
▪ Making positive comments regarding individuals, employees and families' current and expected abilities and potential	▪ Giving only negative feedback and/or criticizing personal traits
▪ Allowing others to make mistakes in a non critical setting; trusting their judgment and abilities while showing respect for their intelligence	▪ Controlling people and situations
▪ Assigning appropriate tasks and training to front-line workers to establish a learning environment that promotes empowerment in others	▪ Assigning the same tasks to the same people all the time; giving front-line workers solutions to problems before they have had the opportunity to solve them

LEVEL 1	Provide encouragement

Assist people who receive services and colleagues in enhancing their confidence in their abilities.
- Make a point of spending time with the people who receive services and colleagues, as well as observing a new skill they are learning;
- Be supportive of their efforts when trying new ideas and testing new abilities, or exercise authority;
- Provide constructive (positive and negative) feedback, to ensure that you give a clear message about what they can do to improve; and
- Provide support in their skill development (i.e. time, reinforcement, and encouragement).

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Give recognition.
- Make a practice of recognizing efforts made by others, noting the contribution of the effort to the overall goals you have established;
- Be sure that you include all individuals who participated in the success, such as colleagues, community partners, and family members, etc.; and
- Select an appropriate time to publicly recognize someone who has performed well.

Involve others in the decision making process.
- When you have a decision to make that will have an impact on members of your department or people who receive services outside your agency, include them in the decision making process by explaining the situation or opportunity to them and soliciting their points of view on the issue;
- Clarify at the beginning of the meeting who will make the final decision, and that you want to make sure you have considered all options and implications before doing so; and
- If there is dissent among individuals about the final decision, communicate as openly as possible, and engage those involved in problem solving to make the decision palatable.

LEVEL 2	Provide training and support

Work with people who receive services to identify the strengths and development needs that they will need to work on over the next year.
- Meet with people who receive services currently under your supervision;
- Ask the individual to describe his or her proposed areas for developmental focus by answering the following questions:
  - What are the individual's goals?
  - What skills/behaviours must the individual demonstrate to reach those goals?
- Agree on a plan that incorporates your input and their suggestions;
- Discuss how you can support and empower the individual in his or her development; and
- Commit to providing specific types of support (e.g. courses, books, your time, etc.).

Delegate some meaningful assignments designed to further employee development, and develop new skills.
- Discuss some stretch assignments with team members;
- Do not limit the stretch assignments to operational tasks; and
- Encourage independent behaviour on a new innovative project.

Seek out unique development opportunities for others.
- Look for development opportunities, inside and outside of your department, that will further the capabilities of others, such as the following examples:
  - Participate in cross-functional task forces, temporary lateral assignments, or job rotations;

- Ask the team to prepare a budget representing the goals and priorities of the department and the overall business; and
- Work with the team to recruit and select the next opening available with the group. Offer some selection interviewing training as a developmental experience.

LEVEL 3	Build competence and confidence

Review your current workload, and identify routine tasks that could be delegated.
- Make a practice of delegating routine tasks;
- Ask the team if your instructions are clear and understandable; and
- Recognize employees for doing their jobs well.

Use strong team members to help other team members in need of support and development.
- Encourage strong team members to share their skills and knowledge with team members with developing or emerging skills;
- Set up a buddy system for mentoring within your group, or outside your group;
- Allow team members and mentors to develop their own mentoring process;
- Ask each team member to identify a possible mentor who has demonstrated strength in the areas the team member needs to develop;
- Discuss each team member's development needs with them to ensure there is alignment on development needs and goals;
- Identify those team members that are in need of development, and set up one-on-one discussions with each of them; and
- Monitor the results of the process by asking for feedback from team members and mentors after three months.

Encourage direct support workers and educators to transfer knowledge and skills to the people who receive support to maximize their potential and promote self-sufficiency.
- Model desirable behaviours for direct support workers and educators, and demonstrate how to design effective and fully inclusive services for people who receive support; and
- Share the following key considerations with direct reports to increase the likelihood that they are not just helping, but empowering people who receive support by:
  - **Introducing age-appropriate/individual appropriate activities based on their situations**; all lesson plans, activities, and events involving people who receive support need to meet this criteria. Remember, all interactions and teaching practices affect the public's perception of persons with disabilities;
  - **Normalization**; avoid specialized classes, events, and unnatural learning environments wherever possible. Promote learning through natural opportunities in real-life situations; and

- **Dignity of risk**; avoid sheltering people who receive services so they can experience growth and development and develop informed decision making skills to make independent choices.

LEVEL 4 **Fully empower individuals**

Show willingness to delegate full authority
- Identify an ongoing issue, and the individuals who will need to work together to resolve it. Delegate decision making authority to others;
- Invite these individuals to a team meeting to decide how to approach the issue. Prior to the meeting, obtain two flipcharts or a room with a whiteboard, and follow these recommendations;
  - At the beginning of the meeting, ask the team to generate a list of the key decisions that need to be made. Document these items on a flipchart or whiteboard;
  - Add your own views to the list, but focus your efforts on encouraging each member of the team to contribute to the discussion;
  - Ask the team for their views on the best approaches for making each decision;
  - Record their suggestions on the other flipchart or the other side of the whiteboard. Where you agree with the advice, share your opinion, and endorse the decision. Where you disagree, explain why; and
  - Support the team's decision even if it is different from your own point of view, unless it has serious implications. When the meeting is over, make a brief note of the decisions that were made and give a copy to everyone who was at the meeting.

Develop a continuous improvement mindset by including feedback (both positive and negative) as a regular, expected part of all meetings.
- Describe the behaviour of others in objective, specific terms;
- Be honest; providing constructive, positive feedback, while ensuring that you clearly state what the individual can do to improve;
- Focus on the work, not the person, and give specific examples. For example, "You have not developed a succession plan for your area," is less likely to arouse defensiveness than stating, "You are not doing your job."
- Incorporate best practices discussions into all regular meetings for the purpose of staff sharing their successes and learnings;
- Be prepared to outline the resources or other support you can provide the employee with to assist in his/her development; and
- Use a special award programs, or less formal means, to recognize special efforts.

Foster an environment where employees take ownership of the development of their respective teams.

- Schedule regular individual discussions with employees who have engagement, management, or performance counseling responsibilities to discuss the progress of their teams, and achieving their own personal goals;
- Ask employees to provide you with regular updates on their progress. If a key result is falling short of target, work with them to identify specific actions to align it with their personal or agency goals;
- Set challenging but realistic objectives and target deadlines collaboratively with employees
- Start with objectives where there is a high probability of attainment to build momentum, and the individual's confidence in his/her own abilities; and
- Remember that you are acting as a role model and a coach for employees. Consider how you are asking questions, assigning responsibility, and monitoring the member's success. They may use this format as the model to which they refer when they are in similar coaching situations.

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Training

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- CDBA ON. Enhancing Coping Skills. (in-house training)

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Resources

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Book(s)

- Individualized Service Plans: Empowering People with Disabilities, by Paul Spicer (Authorhouse, ISBN: 9781420822748)
- Coaching, Counseling and Mentoring: How to Choose the Right Technique to Boost Employee Performance, by Florence M. Stone (2nd Edition: AMACOM, 2007; Original: AMACOM, 1999).
- Coaching Life Changing Small Group Leaders, by Bill Donahue and Greg Bowman (Zondervan, 2006).
- 1001 Ways to Reward Employees: 100's of New Ways to Praise!, by Bob Nelson (Workman Publishing Co, 2005).
- Coaching and Feedback for Performance, by Duke Corporate Education (Dearborn Trade Publishing, 2005).
- Coaching for Meaning: The Culture and Practice of Coaching and Team Building, by Vincent Lenhardt (VHPS Palgrave, 2004).
- Behavioural Coaching, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2003).
- Coaching for Performance: Growing People, Performance and Purpose, by John Whitmore (3rd Edition: Nicholas Brealey, 2002).
- Managers as Mentors: Building Partnerships for Learning, by Chip R. Bell (Trade Paperback: Berrett-Koehler., 2002).
- The 17 Indisputable Laws of Teamwork: Embrace Them and Empower Your Team, by John C. Maxwell (Nelson Books, 2001).
- Empowerment Takes More Than a Minute (2nd Ed.), by Ken Blanchard (Berrett-Koehler, 2001).

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Video(s)

- Agoos, S. (2016). TED-Ed. 5 tips to improve your critical thinking. Retrieved from: https://www.youtube.com/watch?v=dItUGF8GdTw
- "Breaking the Delegation Barrier", (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Changing Role of Supervisor", by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching and Performance Feedback Series", by QMR (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Empowering Others - Part 1 of 2" (AMA Partnership Services on Empowerment).
- "Giving Feedback - Advanced Skills" (International Tele-Film, 1-800-561-4300, www.itf.ca).

Workshop(s)

- Baron, Sherry. Critical Conversations.
- CHKC. Social Role Valorization.
- DBCO. (2013-2014). Intervenor Symposium. Guide Dogs- 45 minutes- Landra Berwick
- DBCO. (2013-2014). Intervenor Symposium. The Key to Independence- 45 min- Marta Zaharia and Melanie Gauthier-Perley
- DBCO. (2008). Intervenor Symposium. Allies in Empowerment- Jessica Nuccio Deerhurst.
- DeafBlind Ontario Services. Experience of a Life Sensory Excursion- Peer to Peer- Angela Brown, Heather Ferrie.

WORK AS A TEAM

The ability to collaborate and work cooperatively with others (e.g. consumers, co-workers, occupational therapists, behavioural specialists, physicians, family members, etc.) to achieve shared goals and deliver outstanding service for consumers and families.

LEVEL 1	Collaborate with others
LEVEL 2	Value others and solicit input
LEVEL 3	Encourage others
LEVEL 4	Work to build team commitment and spirit

This Means...	This Doesn't Mean...
• Developing trusting and productive relationships to secure and build on future opportunities for the agency	• Limiting your relationships with stakeholders to basic transactions
• Working co-operatively with the people who receive support, team members, families, stakeholders; and community partners to reach common goals	• Assuming others will support your own objectives
• Regularly soliciting input in team meetings or circulating reports for comments; amending reports or actions as a result of the input	• Attending team meetings without contributing or using barriers (e.g. time, cost, etc.) as ways to exclude others from discussion or adding their ideas to the project

LEVEL 1	Collaborate with others

Understand the consumer's point of view, and sharing this knowledge with your network.
- After an interaction with a consumer, try to imagine what they were feeling or thinking during your interaction with them;
- Think about how what you did influenced that person, positively or negatively;
- Document what you would do differently next time to make the interaction more positive; and
- Share this information with people in your network who would benefit from this knowledge before the next time they interact with the same consumer.

Avoid destructive messages, such as:

- *Communicating through someone else* – a statement that expresses dissatisfaction indirectly to the person, but through someone else;
- *Communication shut-down* – a statement or action that cuts off discussion with no plan to continue;
- *Discounting* – minimizing another person's comments by inappropriate reassuring, distracting, or humouring;
- *D-J-A* – the person defends what was said, justifies it, and launches verbal counterattack. This approach is frequently used when a person feels defensive;
- *Double bind* – sending a message where the words convey a different message than the person's attitude or body language;
- *Judging/blaming* – placing blame or making judgments about another person; this often involves finger pointing;
- *Mind reading* – assuming that your perception of a confusing message is right without clarifying or assuming the other person can read your mind;
- *Mixed messages* – sending a message where the words convey a different message than the person's attitude or body language;
- *Premature Advice* – offering immediate advice to someone without showing concern for their feelings, listening, or helping them solve a problem;
- *Silent Treatment* – feeling resentment of anger toward another, but not addressing it directly with that person;
- *Threatening* – expressing an intention to do harm to another person; and
- '*You Shoulds'* – statements like, "You should do this..." which insinuate that the other person should know what is expected of them.

Demonstrate cooperation in working with others.

- Place emphasis on listening actively, drawing out the interest, concerns, needs, and objectives of others;
- Demonstrate that you are listening and taking others seriously by restating what you are hearing. Reflect on your understanding of what others are communicating;
- Avoid taking control of the agenda, or being the first to make suggestions; try playing different roles within the group instead;
- Even when engaged in task-related discussions or meetings, place extra emphasis on listening actively;
- Openly address and seek support to resolve conflict among team members as soon as it surfaces; and
- Emphasize other people's common goals, and how everyone depends on each other.

LEVEL 2   **Value others and solicit input**

Make an effort to participate on a project that will require a high level of collaboration with others.
- Take advantage of this opportunity to improve your collaboration skills;
- Prior to beginning the project, create a list of behaviours and actions which you believe a good team member needs to demonstrate, and review these with the team;
- Look for opportunities to help other project team members, even if it falls outside the scope of the original project; and
- Meet with members of the team during or after the project to discuss how you demonstrated collaboration, and reflect on whether you fulfilled your initial list of behaviours.

Evaluating the effectiveness of the team.
- Help employees identify both strengths and areas where the team needs to develop;
- Consider using the following evaluation criteria below:
  - Clarity of purpose;
  - Communication;
  - Problem solving;
  - Decision making;
  - Service orientation;
  - Quality of work
  - Feedback;
  - Adaptability; and
  - Conflict resolution
- Review the evaluation criteria with the team, and monitor progress;
- For each criterion, rate the team using the following scale:
  - **1** (team is not at all effective);
  - **2** (team is slightly effective);
  - **3** (team is effective In some situations);
  - **4** (team is effective most of the time); and
  - **5** (team is effective all of the time).
- Use the rating number to indicate the order of priority for the team's developmental needs. For example, if you rated *conflict resolution* as 1, this is among the first areas that should be focused on for development. Focus on only a few developmental areas at one time.

Identify someone who is known as having strong collaboration skills to learn from them.
- Once you have identified a person who has strong collaboration skills, observe them interacting with others;
- Take notes on what you see. After an interaction, ask them questions to understand their thinking behind their actions, such as:
  - What did they say to the individual?
  - What did they do?

- How did they identify common ground?
- What did they learn from the individual?
- Discuss the techniques and approaches the person used to ensure they understood the perspective of the other person; and
- Discuss how to look for opportunities to anticipate the issues or concerns your colleagues are facing.

LEVEL 3 **Encourage others**

Show a willingness to support team decisions.
- Identify an ongoing project which would benefit from involving others working together as a team;
- Identify which individuals are required to work together on this project;
- Invite these individuals to a meeting to accomplish the following:
    - Get feedback on your existing project plan and objectives;
    - Obtain input on how your project may impact the wider sector/network; and
    - Identify synergies where your project might help to meet objectives of other functional groups or regions.
- Organize a team meeting for the express purpose of deciding how the project will be conducted. Prior to the meeting, have two flipcharts or a room with a whiteboard;
- Ask the team, at the beginning of the meeting, to generate a list of the key decisions that need to be made, and write this list on a flipchart or on the whiteboard;
- Ask the team for their views on the best answers to each decision;
- Ensure that you contribute your own views to this list, but try to say as little as possible. Instead, focus on encouraging each member of the team to contribute to the discussion;
- Record the team's suggestions on the flipchart or the other side of the whiteboard. Again, say as little as possible, and encourage others to speak. When you agree, share your opinion, and personally endorse the decision. Where you disagree, explain why, and provide other ideas for the team to consider;
- Document brief notes about the decisions made, and provide copies to the attendees;
- Identify individuals who you think can provide a different perspective on this project;
- If appropriate, establish a permanent representative group to further explore cross-functional interests, and potentially expand the project scope to include other functions or regions; and
- Support the team decision even when it is different from your point of view, unless it has serious implications. In this instance, indicate that you will be requesting your supervisor/manager to participate in the decision making process.

Target relationship and network building based on individual's insight.
- Build a plan for long-term relationship building. Consider your strategic goals, and your own role in realizing them by:
    - Identify the need for support, and the sources of support;

- ▪ Identify the key people who will be important to you in the future;
- ▪ Plan to initiate and strengthen your relationship with them over time; and
- ▪ Focus initially on building rapport with them.
- Think about your agency and the community it serves by:
  - ▪ Identifying the individuals to create relationships with;
  - ▪ Creating a plan for getting to know these individuals; and
  - ▪ Speaking with colleagues who have experience in establishing relationships key influencers in the community.
  - ▪ Create a list of these key influencers, and make it a priority to get to know them, and integrate them into your network.

Develop your team problem solving skills.
- Identify a current, pressing problem which your team is having difficulty overcoming/solving (e.g. interpersonal conflict among team members; inability to meet deadlines, etc.);
- Meet with your manager, and describe the current situation;
- Provide your assessment on the root causes and possible solutions to the impasse;
- Ask for your manager's input on how best to resolve the problem; and
- Summarize the results of your discussion, and prepare a plan to implement the solutions you have identified with the support of your manager.

LEVEL 4   Work to build team commitment and spirit

Create a forum for knowledge sharing.
- Ask for volunteers from across functions, agencies or regions to form a committee that will establish an appropriate forum for knowledge sharing; and
- Work with the committee to clarify design criteria for a knowledge sharing process, system or platform. You should discuss the following:
  - What knowledge is currently available;
  - Existing gaps in knowledge;
  - What impedes knowledge sharing;
  - What can be done to overcome that; and
  - Available resources (e.g. access to technology).
- Agree on an action plan and accountabilities for the implementation of the process, system, or platform the committee has suggested; and
- Develop guidelines for knowledge sharing that can improve the exchange of ideas and best practices. Share these widely across relevant groups.

Improve the quality and depth of the relationships you have with other teams, community partners, agencies, and regions.
- List the individuals outside of the team you regularly contact;
- Use the scale below to evaluate the quality of your relationship with each individual on the list:
  - **1 – poor relationship** (i.e. there is a current serious problem which has not been resolved);
  - **2 – adequate relationship** (i.e. strictly business/transaction oriented);
  - **3 – reasonably good relationship** (i.e. someone who provides you with consistent feedback and ideas, and who will contacting you to discuss issues); and
  - **4 – extremely good relationship** (i.e. a close colleague you trust to explore organizational issues, and identify synergies).
- Identify any barriers impeding your relationships, and specific actions you can take to remove them
- Set a personal deadline for improving relationships with each individual on your list that is a category 1 or 2. Do any of the barriers that you have just identified apply to these relationships?
- Define a plan for nurturing the relationships in category 3;
- Maintain the relationships that fall into category 4; and
- Monitor your progress against your goals.

Practice the following skills and behaviours in situations of potential conflict in the team.
- Ask for everyone's input, and highlight the different perspectives and opinions;
- Be aware of the interpersonal progress of the group, and reinforce positive behaviours;
- Coach the team to avoid repeating negative behaviours;
- Emphasize people's common goals, and how everyone depends on each other;
- Encourage open discussion for the group to come to a compromise;

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- Encourage positive perception between team members by coaching others to be concise;
- Have the group develop its own rules of conduct/norms;
- Help to define the problem by coaching others to be concise, and prioritize factual statements;
- Insist on true consensus within the team, when appropriate;
- Practice good listening skills;
- Treat each person (and their opinions) with respect;
- Use group pronouns (i.e. we, us, ours);
- Warn team members to avoid situations where people give in out of sheer exhaustion; and
- Thank the team for their participation and contributions.

Education/Credit Course(s)

- Coaching for Challenging Conversations, Queen's University & Performance Coaching Inc., Executive Education, Smith School of Business, https://smith.queensu.ca/ConversionDocs/Execdev/short_term_program/coaching_for_challenging_conversations.pdf
- Fierce Conversations, Fierce Inc., http://www.fierceinc.com/programs/our-approach

Resource

Book(s)

- Mastering Virtual Teams, by Deborah L. Duarte & Nancy Tennant Snyder (New Edition: Jossey-Bass Publishers, 2006; Original: Jossey-Bass Publishers, 1999).
- The Fifth Discipline: The Art and Practice of the Learning Organization, by Peter M. Senge & Bryan Smith (New Edition: Currency, 2006; Original: Doubleday, 1994).
- The Power of We: Succeeding Through Partnerships, by Jonathan H. Tisch & K. Weber (John Wiley & Sons. 2005).
- Effective Teamwork: Practical Lessons from Organizational Research, by Michael A. West (Blackwell Publishing, 2004).
- Teach Your Team to Fish: Using Ancient Wisdom for Inspired Teamwork, by Laurie Beth Jones (New Edition: WaterBrook Press, 2004; Original: Crown Business, 2002).
- Creative Collaboration: Simple Tools for Inspired Teamwork, by Bruce Honig & Alan Rostain (Thomas Nelson, 2003).
- Lessons Learned: Shaping Relationships and the Culture of the Workplace, by Roland Barth (Corwin Press Inc., 2003).
- The Wisdom of Teams: Creating the High-Performance Organization, by Jon R. Katzenbach & Douglas K. Smith (New Edition: Harper Collins, 2003; Original: Harvard Business School Press, 1993).
- Virtual Teams That Work: Creating Conditions for Virtual Team Effectiveness, by Cristina B. Gibson & Susan G. Cohen (John Wiley & Sons, 2003).
- 8 Lies of Teamwork, by Michael Wachter (Corporate Impact, 2002).

- Cross-Functional Teams: Working with Allies, Enemies and Other Strangers, by Glenn M. Parker (New Edition: John Wiley & Sons, 2002; Original: Jossey-Bass, 1994).
- Team Troubleshooter: How to Find and Fix Team Problems, by Robert W. Barner (Davies-Black Publishing, 2001)
- How to Make Collaboration Work: Powerful Ways to Build Consensus, Solve Problems, and Make Decisions, by David Straus & Thomas C. Layton (Berrett-Koehler Publishers, 2002).
- Leading Teams: Setting the Stage for Great Performance, by J. Richard Hackman (Harvard Business School Press, 2002).
- The Five Dysfunctions of a Team: A Leadership Fable, by Patrick M. Lencioni (John Wiley & Sons, 2002) – also available on audio CD.
- The 17 Essential Qualities of a Team Player: Becoming the Kind of Person Every Team Wants, by John C. Maxwell (Thomas Nelson, 2002) – also available on audio CD.
- Building the Emotional Intelligence of Groups, by Vanessa Urch Druskat, Steven B. Wolff (Harvard Business Review. 2001).
- Leading Beyond the Walls: Wisdom to Action Series (The Peter F. Drucker Foundation for Nonprofit Management), by Frances Hesselbein, Marshall Goldsmith & Iain Somerville (New Edition: John Wiley & Sons, 2001; Original: Jossey-Bass Publishers, 1999).
- Managing Strategic Relationships: The Key to Business Success, by Leonard Greenhalgh (The Free Press, 2001).
- High Five! The Magic of Working, by Kenneth Blanchard & Sheldon Bowles (Harper Collins, 2000).
- The Handbook of Interpersonal Skills Training: 16 Complete Training Modules for Building Working Relationships, by Bob Wall (McGraw-Hill Trade, 2000).
- The New Why Teams Don't Work: What Goes Wrong and How to Make it Right, by Harvey A. Robbins & Michael Finley (Berrett-Koehler, 2000).
- The Radical Team Handbook, by John C. Redding (Jossey-Bass Publishers, 2000).
- The Performance Factor: Unlocking the Secrets of Teamwork, by Pat McMillan (Broadman and Holman Publishers, 2001)
- The Discipline of Teams, by Jon R. Katzenbach and Douglas K. Smith (John Wiley & Sons Inc. 2001)
- The Frog Prince: Secrets of Positive Networking, by Darcy Rezac (Frog & Prince Network Corp., 2003).
- Leading Beyond the Walls: Wisdom to Action Series (The Peter F. Drucker Foundation for Nonprofit Management), by Frances Hesselbein, Marshall Goldsmith & Iain Somerville (John Wiley & Sons, 2001).
- Managing Strategic Relationships: The Key to Business Success, by Leonard Greenhalgh (The Free Press, 2001).
- Networking: Building Relationships and Opportunities for Success, by Melissa Giovagnoli & Jocelyn Carter-Miller (Jossey-Bass Publishers, 2000).
- Networking Smart: How to Build Relationships for Personal and Organizational Success, by Wayne E. Baker (New Edition: Backinprint.com, 2000; Original: McGraw-Hill, 1993).

Movie(s)
- "Another Look: Defining Respect in Healthcare", by VisionPoint Productions Inc. (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "Relationship Strategies Course", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Video(s)
- "America3: The Power to Create" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "Building The Perfect Team", by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Five Star Teamwork", by Workplace Publishing (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Groupthink2e" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "How to Deal with Difficult People" (Career Track Publishing, 1-800-780-8476, www.pryor.com).
- "Mining Group Gold" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "The Abilene Paradox" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "Team Building", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Team Building: What Makes A Good Team Player?" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).
- "Teamwork Essentials", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Workteams and the Wizard of Oz", by Advanced Knowledge Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

Workshop(s)
- Team-Building, Eagle's Flight
- Generational Diversity, Paula MacLean
- Effective Communications, Sherry Baron
- Conflict Resolution, Sherry Barron – Career Concepts
- Critical Conversations, Sherry Baron
- *Note: managers & supervisors (level 4)*
- Conflict Management, Spindel Consulting (Trish Spindel) www.spindelconsulting.com
- Dealing with Difficult People, Fred Pryor Seminars (online, onsite), www.pryor.com
- Personality Dimensions, Trainers: Natalie Manneh and Theresa Merrifield (DBOS), www.personalitydimensions.com
- DBCO. (2010). Intervenor Symposium. Humour The Barrier Buster- Lorraine Behnan, Sheraton TO.

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DEMONSTRATE CREATIVE PROBLEM SOLVING AND DECISION MAKING

Definition

The ability to come up with creative ideas and solutions to solve problems and make decisions. It involves understanding the situation, gathering information, weighing alternatives, and choosing the most appropriate solution or course of action. It includes "thinking outside the box" and going beyond the conventional by exploring creative ideas and approaches.

LEVEL 1	Use a common sense approach to solve problems
LEVEL 2	Analyze problems or decisions and propose solutions
LEVEL 3	Think creatively to identify options and solutions
LEVEL 4	Solve complex problems

This Means...	This Doesn't Mean...
• Waiting for all the information before evaluating options and thinking ahead about the outcome of an action (e.g. If I do A, then B and C will also happen)	• Evaluating options before getting all relevant information or solving the immediate problem without thinking about other problems that may follow (i.e. the long-term impact)
• Looking for the common factors in different situations, and using/modifying previously successful approaches to meet the unique needs of the situation	• Reinventing new approach for every situation, and overlooking common sources of difficulty to focus on the peculiarities of each situation
• Looking at "big picture" patterns, which may not be obvious to others, and knowing how this will impact several areas/departments across the agency to solve problems and develop services or approaches	• Getting stuck on a single line of reasoning by focusing in on the detailed components of a problem

Activities

LEVEL 1	Use a common sense approach to solve problems

Brainstorm potential solutions to a problem before you draw conclusions or make a decision.
- Choose a challenging problem that you are currently facing that you have not yet resolved;
- List all the possible solutions that come to mind. For example, if you have difficulty identifying possible solutions, consider using creative visualization techniques. Picture yourself with the person who receives support, and imagine what you may say and what they may say to you;
- Do not evaluate or critique any of the solutions or suggestions until you have exhausted all possible ideas; and

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- End the brainstorming session by identifying the best solution and next steps.

Identify a recent problem that was successfully resolved.

- Plan to meet with the people involved in the problem resolution.
- Find out how they dealt with the problem or situation. Ask the following:
  - How did they overcome these difficulties?
  - What were the resources that they used?
  - What difficulties did they encounter?
  - What were the specific outcomes of their efforts?
- Use this information when you are confronted with similar problems or situations.

Think about your approach to problem solving.

- When faced with an issue or problem, break the problem down into manageable parts. Ask questions to increase your understanding of the events that have led to the current situation, then think of the various ways the situation could be resolved;
- Before selecting a solution, think ahead to the impact of your choice. What are the potential consequences of your decision or action? What are the next steps that may be required for the solution to be successful? Who will the decision (or action) impact? What might their reaction be?
- Re-evaluate your approach to the problem, if necessary, to achieve a desired outcome.

| LEVEL 2 | Analyze problems or decisions and propose solutions |

Identify and eliminate the root cause of a problem.

- Identify a problem with a person who receives support or other work-related situation that you are having difficulty solving;
- Write a brief description of what the problem is, and its related consequences; and
- Break the problem into its component parts by clearly identifying the following:
  - General problem areas relating to the overall issue (e.g. poor communication, failure to delegate, inadequate procedures), and how they relate to each other; and
  - The root cause(s) of the problem. Be sure to distinguish between a true root cause versus a symptom or consequence of a root cause.
- Write a plan of action you will take to address each root cause, with a completion date for each action.

Engage in careful decision making.

- Resist the urge to make quick decisions about how a problem should be solved without fully exploring your options;
- Make sure you consider the unique facts about the situation before making a final decision. Develop a thorough list of positive and negative consideration when evaluating a potential solution. Ensure that you consider both short- term and long-term effects;

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- Estimate the costs and benefits of each attribute. After you have done this for each factor on your list, summarize your analysis in a single number (i.e. equal to the total estimate costs minus the total estimated benefits); and
- Use this methodology to perform comparative analyses of alternative solutions.

Conduct a problem prevention analysis.

- Talk to your direct reports to identify problems which may arise in the agency over the next few months. Only ask for a brief description, not the potential causes or solutions;
- List the possible causes for each problem that has been identified with your direct reports. Describe how you would further analyze the problem to identify true root causes, and recommend possible solutions to prevent the problem from occurring; and
- Review your analysis with your direct reports. Validate the accuracy of your solutions.

LEVEL 3	Think creatively to identify options and solutions

Develop alternative ways of looking at a problem.

- Select a problem which you are genuinely interested in understanding or resolving. The problem should limited in scope, and you should be familiar with its past history (i.e. what has led up to the problem and previous attempts, if any, to resolve it);
- Describe the problem in a brief statement. For example, you might state the problem as. "The staff turnover in a particular area has steadily increased over the past two years," or "Measures of customer service satisfaction are not improving despite our new incentive programs;"
- Identify the key factors in the problem from your perspective;
- Imagine you are going to tell someone a story about the problem. What are three or four key characteristics or details you would want to convey?
- Identify the key factors of the problem from the perspective of others. Ask yourself the following questions:
    - How would others/supervisors/managers/directors view this problem? What factors would they see at their level?
    - How would the supervisors/managers/directors in other departments view this problem? What factors would they see from their perspective?
    - How would staff in other departments within the agency view this problem? What factors would they see?
    - How would people who receive support view this problem? What factors would they see?
- Prepare a summary of your findings; and
- Identify the immediate steps you could take to help resolve the problem. Take the first steps.

Lead a problem solving group.

- Use your intuition when making decisions in the group. When you feel there is lack of consensus or uncertainty in the group, pause, and make a decision. Consider the following examples for a group session:
  - Freeing up time among team members for competency development;
  - Managing workflow;
  - Holiday scheduling;
  - Team roles and accountabilities; and
  - Cross-team responsibilities.
- Use the following outline to structure an agenda for the meeting:
  - Prepare a clear statement of the problem. Work with the group to write a sentence or phrase that clearly explains the problem;
  - Brainstorm a list of possible ideas about the problem. This list may include causes, solutions, action steps, processes, or decisions. Do not critique any ideas until the group has exhausted the list of possibilities; and
  - Identify the best way to move forward with the assistance of the group.

Search for patterns or themes to a current problem before you draw conclusions or make a decision.

- Choose a challenging problem that you are currently facing with a customer that you have not resolved;
- List all the possible solutions that come to mind;
- Do not evaluate or critique any of the solutions or suggestions until you have exhausted all possible ideas;
- Assess the symptoms and try to identify common themes or root causes;
- Develop an action plan to address the root cause;
- Present your findings to key stakeholders, along with your proposed solutions;
- Brainstorm all of the possible solutions;
- Assess the symptoms of the problem, and try to identify common themes or root causes; and
- Choose several solutions based on how well they address the root cause.

| LEVEL 4 | Solve complex problems |

Identify a difficult problem or situation where there are several alternative courses of action you can take to resolve it. Follow the steps below:

- Document the problem using the chart in the example shown below.
- List the criteria you will use to evaluate each alternative down the left side of the chart. Some examples of criteria include:
  - Resource costs (e.g. time, people, capital, etc.);
  - Customer satisfaction;
  - Political risk; and
  - Efficiency.

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- Identify several possible alternatives to resolve the problem. Write these across the top of the chart; and
- Determine how well each alternative meets each criteria. Assign a weighting for each alternative for each criteria using the scale below:
  - **1 – alternative does not meet criteria;**
  - **2 – alternative minimally meets criteria;**
  - **3 – alternative somewhat meets criteria;**
  - **4 – alternative fully meets criteria; and**
  - **5 – alternative exceeds criteria.**
- Total the weight scores for each alternative at the bottom of the chart;
- Determine the positive and negative factors of each alternative on the chart; and
- Select the alternative which best meets your most important criteria.

Complex Problem Solving Example
Theoretical Problem: Which house to buy?

CRITERIA	ALTERNATIVE 1 *St. Albert House*	ALTERNATIVE 2 *Edmonton South House*	ALTERNATIVE 3 *Downtown Condo*
Cost	4	3	3
Location	2	3	4
Resale Value	4	3	2
Distance From Work	2	3	4
Etc.	--	--	--
Total	--	--	--

Develop alternative ways of looking at an issue.
- Select a business area issue that you are genuinely interested in understanding or resolving. The problem should be of limited scope, and you should be familiar with its past history (i.e. what has led up to the problem and previous attempts, if any, to resolve it);
- Describe the problem in a brief statement, such as the following example:
  - State the problem as, "The staff turnover in my particular business unit has steadily increased over the past two years," or "Measures in customer satisfaction are not improving despite our new service programs;"
- Identify the key factors in the problem from your perspective;
  - Pretend you are going to tell someone a story about the problem. What are the three or four key characteristics or details you would want to convey?
- Identify the key factors in the problem from the perspective of others. Ask yourself the following questions:
  - How would directors in other areas view this problem? What factors would they see from their perspective?

- How would customers view this problem? What factors would they see?
- Prepare a summary of your findings. Identify any immediate steps you could take on your own to help resolve the problem.

During the next two weeks, make a list of unexpected problems or issues when dealing with people who receive support, and think through the possible trends or patterns.

- Examine the list and try to identify any common themes or similarities, and ask yourself the following questions:
  - Have I seen this type of problem before?
  - What do I already know that may help me to solve the problem?
  - What may be the cause of the problem?
  - Is there anything that could have prevented the problem from occurring? If yes, what action could have prevented it?
  - Is there anything I could have done to speed up my understanding of the problem?
- Document your answers; and
- Take action to make use of these identified trends in order to overcome similar situations in the future.

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Training
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- Innovative and Design Thinking, Queen's University Executive Education, Smith School of Business, https://smith.queensu.ca/ConversionDocs/Execdev/short_term_program/design%20thinking.pdf
- CHKC Workshop: Conflict Resolution
- Conflict Resolution – Sherry Barron – Career Concepts
- CDBA ON. Challenging Behaviors (active training).

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Resources
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Book(s)
- Rational Choice and Judgement: Decision Analysis for the Decider, by Rex Brown (Wiley-Interscience, 2005).
- Critical Thinking: Tool for Taking Charge of Your Professional and Personal Life, by Richard W. Paul & Linda Elder (Prentice Hall, 2002).
- Smart Choices: A Practical Guide to Making Better Decisions, by John S. Hammond, Ralph L. Keeney & Howard Raiffa (Broadway, 2002).
- Critical Thinking: An Introduction to Analytical Reading and Reasoning, by Larry Wright (Oxford University Press, 2001).
- The Art of Thinking: A Guide to Critical and Creative Thought, by Vincent R. Ruggiero (Longman, 2006).
- Imagination Engineering: How to Generate and Implement Great Ideas, by Paul Birch & Brian Clegg (New Edition: Prentice Hall, 2007; Original: Prentice Hall, 1996).

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- The Way We Think: Conceptual Blending and The Mind's Hidden Complexities, by Gilles Fauconnier & Mark Turner (Basic Books, 2003).
- The Five Faces of Genius: Creative Thinking Styles to Succeed at Work, by Annette Moser Wellman (Penguin USA, 2002).
- Conceptual Blockbusting: A Guide to Better Ideas, by James L. Adams (New Edition: Perseus Books, 2001; Original: Addison Wesley Longman, 1990).
- The Ultimate Book of Business Creativity: 50 Great Thinking Tools for Transforming Your Business, by Ros Jay (New Edition: Capstone Pub, 2001; Original: John Wiley & Sons, 1999).
- The Einstein Factor: A Proven Method for Increasing Your Intelligence, by Win Wenger & R Poe. (New Edition: Gramercy Books, 2004; Original: Prima Lifestyles, 1995).
- Smart Choices: A Practical Guide to Making Better Decisions, by John S. Hammond, Ralph L. Keeney & Howard Raiffa (Broadway, 2002).
- Master Thinker, by Edward deBono (Audio Literature, 2000).
- Thunderbolt Thinking, by Grace McGartland (New Edition: Bard Press, 2000; Original: Bard Press, 1993).

Movie(s)
- "Decisions, Decisions", by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Discovering the Future, The Business of Paradigms", by Charthouse (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Mindworks Series: Forced Connections", by Producers Media International (International Tele-Film, 1-800-561-4300, www.itf.ca).
-
- "Why Didn't I Think of That?", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Video(s)
- DecisionSkills. (2014). *How to solve a problem in four steps*. Retrieved from: https://www.youtube.com/watch?v=QOjTJAFyNrU
- Big Think. (2014). *Think Small to Solve Big Problems, with Stephen Dubner*. Retrieved from https://www.youtube.com/watch?v=fypkPgeQxBQ
- TED Talks. Chang, R. (2014). *How to make hard choices.* Retrieved from https://www.youtube.com/watch?v=8GQZuzIdeQQ
- Smith, S. (2016). VideoScribe. *What is Creative Problem Solving?* Retrieved from: https://www.youtube.com/watch?v=QbxyiUG5RRI

DEMONSTRATE FINANCIAL ACUMEN

Definition

The ability to manage finances and resources to maximize results. It includes understanding financial management principles and reporting requirements, and effectively managing the agency's funding through careful planning and monitoring of resources (e.g. financial and other).

LEVEL 1	Understand the importance of how finances and resources are managed
LEVEL 2	Manage finances and resources
LEVEL 3	Seek to improve financial and resource management
LEVEL 4	Make financial and resource management a priority

This Means...	This Doesn't Mean...
▪ Ensuring that projects/initiatives are completed in a cost effective and efficient manner while maintaining or improving current quality standards	▪ Using resources without regard to the costs associated with waste (i.e. inefficient use of time, supplies, personnel, etc.)
▪ Acting in a fiscally responsible manner when using the agency's resources	▪ Using the same combination of resources to achieve business goals without investigating more effective alternatives
▪ Trading resources with other agencies in the sector so as to achieve greater efficiency	▪ Exclusively keeping your resources within your department or agency, and not sharing them with others for a mutually beneficial outcome

Activities

LEVEL 1	Understand the importance of how finances and resources are managed

Consider the following general tips to improve your financial acumen.
- Plan how you can effectively use finances and resources to accomplish your goals, assignments, or projects;
- Monitor your progress against milestones; and
- Take the time to get a detailed understanding of the systems, programs, and resources needed to complete your projects.

Identify the resources needed to accomplish a current goal.
- Make a list and prioritize these resources according to their level of importance within the department.

Seek out creative thinkers.
- Identify people who are considered highly creative within your agency;

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- Arrange a meeting(s) to discuss how they approach issues, and identify new ideas or solutions. Incorporate some of their ideas into your own work.
- Read about creative thinkers from the past and present (e.g. Einstein, Galileo, Steven Spielberg, George Lucas, etc.)

LEVEL 2   Manage finances and resources

Identify one or two colleagues who are resourceful, and work to improve your relationship with them.
- Set a goal to have at least one conversation each week;
- Focus on learning about these individuals (i.e. strengths, interests, goals, etc.);
- Discuss how they have handled similar situations to yours. Listen carefully and evaluate which approaches would work best for you; and
- Keep in touch with them on a regular basis.

Talk to people who are highly influential.
- Ask them about specific situations and what they did or would do; and
- Ask them for their top three skills they bring into every influencing situation.

Analyze organizational charts to familiarize yourself with resources across the agency.
- Identify the various functions in the organization and familiarize yourself with their business needs and roles; and
- Take action to learn more about functions closer to your business needs. Review the organizational chart, and contact colleagues in your service area to learn more about what they do, and the resources they have at their disposal.

LEVEL 3   Seek to improve financial and resource management

Look ahead for opportunities and problems.
- Conduct a scenario planning session with the team:
  - Describe the possible scenarios;
  - Lead team members through the process of identifying what could happen in the next six months (either positive or negative) that could impede them from achieving their goals; and
  - Lead them in developing a plan to handle these situations if they should arise.
- Assess whether the forecasts actually materialized and were effectively handled.

Actively build and form new partnerships/networks to benefit the agency and achieve its goals.
- Do not hesitate to establish a new network of associates to gain support for new initiatives within the agency based on individuals' needs;
- Use your expertise and contacts to approach others, and help deliver the services your agency provides; and

- Take the time to form new partnerships/networks where you feel they will be the most beneficial. Both parties need to benefit from the relationship so that the overall mandate is best served and mutual goals achieved.

Ensure that you use your agency's resources in an efficient manner. Devise a method for effective resource allocation.
- Create a plan for your next project, and list the resources needed to follow through on this plan;
- Calculate how much of each resource (e.g. people, materials, funds, etc.) is needed at each stage, and incorporate this into the project plan; and
- When implementing the project steps, try to stay at or below your calculated resource need while maintaining a high level of service quality.

LEVEL 4	Make financial and resource management a priority

Clarify expectations, and develop a plan.
- When accepting a new project or activity, clarify your immediate manager's/supervisor's expectations, your role, and if any resources can be shared across other areas of agency to be more efficient. Define key deliverables and accountabilities.
- Write a plan which lists:
  - Key activities to be performed;
  - Who will perform the activity;
  - Who will provide assistance;
  - Expected outcome of each activity;
  - When it will be completed,
  - Required resources; and
  - How you will measure whether the activity is completed to the standards established.
- Share this plan with your manager/supervisor, and clarify any concerns or issues he or she may raise as they relate to effective resource utilization;
- Regularly track your performance using this plan. Identify when activities are completed and/or milestones are met; and
- If there are any delays or issues with your plan , identify the cause and solving the problem using whatever resources necessary to overcome the obstacle(s), and get back to meeting goals This may involve other departments making sacrifices for the benefit of the agency.

Act as a role model to your colleagues in the organization.
- Think of an initiative/project you worked on that achieved top results at a minimum expense (in terms of human and financial resources);
- Discuss this initiative/project at your next departmental meeting and obtain feedback. Do they agree that it was an example of superior resource management? Do they see any areas to improve upon?

Look at a series of income statements for a description of your department's revenues and expenses over the past three years.

- Examine the expense column and determine where most of your department's expenses lie;
- Use this information to assess what areas require the greatest degree of financial resource allocation;
- Think of measures you can take to cut costs in these areas (e.g. reduced staffing, time saving measures, etc.); and
- When making costs reductions, ensure that the integrity of the agency's future goals and strategic objectives are not weakened.

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Training

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- Budgeting for Nonprofits: https://charityvillage.com/elearning/courses/budgeting-for-nonprofits.aspx
- Strategic Planning: https://charityvillage.com/elearning/courses/strategic-planning.aspx
- Policies & Procedures: https://charityvillage.com/elearning/courses/policies-procedures.aspx
- Critical Financial Controls for Small to Medium Nonprofits: http://charityvillage.com/elearning/webinars/past-webinars/recorded-webinar-critical-financial-controls-for-small-to-medium-nonprofits.aspx
- Four Keys to Financial Success in Small to Mid-Size Nonprofits & Charities: http://charityvillage.com/elearning/webinars/past-webinars/four-keys-to-financial-success-in-small-to-mid-size-nonprofits-charities.aspx

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Resources

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Book(s)

- Fired Up Fundraising Gail Perry 2007
- The Essential Fundraising Handbook for Small Nonprofits 2013 Betsy Baker, Kristen Bullock
- Nonprofit Financial Management – A Practical Guide Charles K Coe 2011
- Achieving Excellence in Fundraising - Hank Rosso
- Conducting a Successful Capital Campaign – Kent Dove
- Relationship Fundraising – Ken Burnett
- The Ask – Laura Frederick

PLAN AND COORDINATE

The ability to plan and coordinate work and execute individual and team activities in a way that ensures the achievement of individual, agency, and consumer objectives.

At the highest levels, individuals are able to achieve desired results on a consistent basis despite having to deal with unpredictable or unexpected circumstances.

LEVEL 1	Plan own work activities
LEVEL 2	Manage multiple priorities
LEVEL 3	Coordinate activities involving others within one's team
LEVEL 4	Plan and execute broader and more complex projects

This Means...	This Doesn't Mean...
• Identifying specific action steps, accountabilities and timelines for completion	• Focusing solely into the details of work because it appears exciting and challenging
• Communicating your expectations to others of their role within the project	• Becoming distracted by other people or projects
• Involving other groups, departments or agencies, as appropriate in the planning process for complex or difficult initiatives	• Operating in a silo and failing to consider the impact an initiative may have on other groups, departments or agencies

Activities

LEVEL 1	Plan own work activities

Develop your time management skills
- Use time management techniques to improve your personal efficiency. For example, spend 10 to 20 minutes at the end of each day planning how you will spend the following day;
- Prepare "to-do" lists, and list the tasks according to priority and determine the amount of time you expect to spend on each. Be realistic knowing that you will need to spend some time answering phone calls or fielding questions from colleagues;
- Prioritize your list in terms of urgency (e.g. A, B, and C);
- Check off items as you complete them. Make sure that you do all the top priority items first, and then move down the list;
- Review your list at the end of the day, see how much you accomplished, and how long it took. Look for reasons which explain any large discrepancies between what you planned, and what you actually accomplished; and
- Resolve issues around dealing with these reasons, or change your future time plans accordingly.

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Determine priorities.

- To manage your time effectively, you need a clear understanding of your short-term and long-term priorities. Without this understanding, it is easy to fall into the trap of reacting to the crisis of the day rather than focusing on what is most critical to you and your organization;
- List your primary accountabilities;
- Rank each accountability according to importance (e.g. A – Most Critical, B – Important, and C – Least Critical). To help decide the rank, ask the following questions:
  - Which of these tasks will be of most benefit to the team/agency?
  - Which tasks do agency/departmental priorities suggest are most important?
  - Which of these tasks does my manager consider most important?
- Adjust your schedule and priorities as necessary to ensure that your daily work aligns with your most critical job accountabilities; and
- Periodically repeat this exercise so that the allocation of your time and energy remains in line with your strategy and objectives.

Ask for regular feedback regarding your planning and coordination skills.

- Ask others if you are showing a high level of planning and coordination
- For example, ask the following questions:
  - Do I develop realistic project timelines?
  - Do I allocate sufficient time for task completion?
  - Am I crystal clear when I communicate about the work we are doing?
  - Can you think of any times I have made errors that could have been avoided?
  - Am I well organized in my work?
- If the feedback is good, take a moment to enjoy your success. If the feedback is poor, you must focus on improving.

LEVEL 2	Manage multiple priorities

Clarify expectations.

- When accepting a new project or activity, clarify the expectations placed on you, and the role you are expected to perform;
- Identify all key deliverables, and their expected delivery date;
- Write a project plan that lists the key activities to be performed, who will perform the activity, who will provide assistance, the expected outcome of each activity, when it will be completed, the required resources, and how you will measure if the activity is completed to the standards established;
- Regularly track your performance on this project using the project plan. Identify when activities are completed and/or milestones are met. If there are any delays or issues in your project plan, identify the cause of the delay, and resolve it using whatever resources necessary to overcome the obstacle(s) to get the project back on schedule; and

- When delegating tasks or projects to members of the team, clarify your expectations and monitor their progress regularly, and keep notes to assist you in reviewing their performance.

Ensure that you use the agency's resources in an efficient manner. Devise a method for effective resource allocation.

- Create a plan for your next project, and list the resources needed to follow through on this plan;
- Calculate how much of each resource (e.g. people, materials, funds, etc.) is needed at each stage, and incorporate this into the project plan; and
- When implementing the project steps, try to stay at or below your calculated resource need while maintaining a high level of service quality.

Create your own methods of ensuring that you can work on multiple tasks simultaneously and meet targets.

- Find out what methods work and do not work for your team;
- Gather input on the current processes and mechanisms in place, and ask what works and does not work;
- Develop new processes and mechanisms based on your team's input and your expertise in the area;
- Ensure that projects stay on track by consistently monitoring progress; and
- Review the new processes and mechanisms with your team regularly.

| LEVEL 3 | Coordinate activities involving others within one's team |

Anticipate problems, identify risks, and plan for contingencies.

- Anticipating potential problems is an important part of the planning process. If you identify risk areas in the initial stages of planning, you can prepare for problems, and mitigate them early. However, unanticipated events and consequences will arise. To develop you ability to anticipate and plan for problems, consider the following suggestions:
  - Review the discrepancies between plans and actual performance from the previous three to six months. Which of these problems could and should have been anticipated? What patterns exist in regard to risks for which you did not plan? What can you do differently to anticipate problems?
  - As a part of your regular planning process, identify risk areas and develop risk management plans for them. Do not assume that risks will not occur;
  - Use data to anticipate and plan for risks. For example, if the plan relies on a stable team, anticipate what you will do if the team loses a member;
  - Use scenario planning to identify three or four different ways in which a situation may evolve. Determine how you and the team will handle each of these scenarios; and
  - After a plan is drafted, brainstorm with the team what might go wrong. Identify the most likely problems, and generate ideas for handling them if they do occur.

Monitor initiatives/assignments against milestones, deadlines, or quality standards that have been set.

- Set milestones or goal deadlines and regularly assess yourself and/or the group against those deadlines. Remember that there is tendency to be overly optimistic about how long each step will take;
- Meet regularly with other team members throughout an initiative/assignment to discuss how you are doing with respect to deliverables;
- Regularly update the relevant people on the status of your work. If a deliverable is falling short of its targets, ensure that impacted groups/individuals are notified right away;
- Talk to the appropriate individuals to find out the impact of non-delivery, and agree on next steps; and
- Seek feedback on your performance from whoever assigned the work.

Creating planning consciousness.

- Over the next three to six months, prepare a breakdown of all tasks and critical decision points, and then determine the critical path of the project;
- Analyze each component to detect areas of risk. Try to think of everything that could go wrong., such as the following examples:
  - Information required for effective planning may be unavailable;
  - A technical procedure new to employees might be required;
  - A service group that you use could experience staff problems; and
  - You could lose a key resource at a critical time.
- Categorize potential problems into high-risk and low-risk areas. When doing this, consider how likely it is that the problem will occur, and how damaging it would be if it did occur;
- Prepare several possible approaches for dealing with problems; and
- Introduce safety factors into your planning for high-risk areas:
  - Consider allocating more time, resources and/or funds to these phases;
  - Introduce tough control methods in high-risk areas; and
  - Ensure that you are kept fully informed of all developments by those involved.

Plan and execute broader and more complex projects

Organize and execute priorities with others.
- Talk to people about relevant issues, concerns, approaches, or ideas;
- Use a matrix to decide what activities need to be done and then determine who should do them. For example, Steven Covey makes reference in his book, "*The Seven Habits of Highly Effective People*," to a time management matrix that lists activities as urgent and not urgent, important and not important as seen below:

	URGENT	**NOT URGENT**

IMPORTANT	I Activities
	  Crises
	  Pressing Problems
	  Deadline Driven Projects
		II Activities
		  Prevention
		  Relationship Building
		  Recognizing new opportunities
		  Planning
		  Recreation

NOT IMPORTANT	III Activities
	  Interruptions, Service Calls
	  Service Mail, Source Reports
	  Some meetings
	  Proximate, pressing matters
	  Popular Activities
		IV Activities
		  Trivia, busy work
		  Some mail
		  Some phone calls
		  Time wasters
		  Pleasant Activities

  - **Quadrant I** activities are crises and emergencies which require immediate attention. Involve others to help with project deadline or tasks;
  - **Quadrant II** activities are priorities that need to be scheduled. Organize your work week and then delegate to others who have time and experience in handling the tasks; and
  - **Quadrant III and IV** activities include phone calls, answering mail, and attending some meetings. These activities should be done but are not urgent or as important. Ask someone to help you out. Have someone attend a meeting in your place.

Evaluate and prioritize the team's initiatives within your work environment.
- People often become caught up in urgent day-to-day activities and crises, losing sight of the importance of developing strategy and planning. Use the following suggestions to ensure that your team spends time on planning and prioritizing:
  - Evaluate their priorities by identifying the important, the urgent, and the less important or less urgent. Ensure they do those items that are both important and urgent, then handle the important ones. Ensure they are delegating to someone else to handle the urgent but less important tasks;
  - When an urgent matter arises, make sure they determine how it fits into their daily, weekly, or monthly plan before they act accordingly;

- ▪ Suggest using the 80/20 rule (80% of the value of a group of items is generally concentrated in only 20% of the items). The 80/20 rule means that you can be 80% effective by achieving 20% of your objectives. Thus, if the team's daily to-do list has ten items, under this rule, they can expect to be generally 80% effective by successfully completing only the two most important items; and
- ▪ Ask the team to keep a log to determine how they are spending their time. Evaluate their time allocations to ensure they are giving proper time and attention to the more strategic and important priorities.

Streamlining and/or improving efficiency for future work.
- Inefficient work processes often result in duplication of effort and frustration among employees. Analyze the flow of work in your own team and across departments within your agency. Identify where your current work process is ineffective or can be completed more efficiently. Look for ways to eliminate or modify inefficient procedures and systems by creating new approaches;
- Identify procedures that you and your team find outdated, overly time-consuming, or difficult to complete;
- Find out the purpose of the procedure; and
- Evaluate the procedure in detail, critiquing each step. Identify what is working, and what is not working, such as:
  - ▪ Identifying bottlenecks and recurring problems;
  - ▪ Identify duplication in effort;
  - ▪ Note places where the formal process is often circumvented;
  - ▪ Highlight internal and external service problems;
  - ▪ Examine the level at which decisions are made;
  - ▪ Identify what information is collected (i.e. why and how);
  - ▪ Include what is working well. Examine why; and
  - ▪ Determine if any steps can be eliminated/combined to save time.
- Generate as many alternate procedures as possible that would meet the same objective;
- Review your potential alternatives. It may be possible to combine the best elements of several alternatives to obtain one superior solution;
- Define and document process and role changes;
- Plan for change. Include internal and external communication, resource needs, and required training; and
- Set up a system to evaluate how well your solution really works. Continue to evaluate and adjust, where appropriate, for improvement over the long-term.

Education/Credit Course(s)
- GBC, Program and Activity Planning - C108, http://www.georgebrown.ca/c108-2017-2018/

Training
- CDBA ON. The Importance of Planning in the Role of the Intervenor.

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Resources

Book(s)

- A guide to Planning and Support for Individuals who are Deafblind John Mclnnes
- Conquering Chronic Disorganization, by Judith Kolberg (Squall Press, 2003).
- Execution: The Discipline of Getting Things Done, by Ram Charan, Charles Burck, Larry Bossidy (Crown Business, 2002).
- Order from Chaos: A Six-Step Plan for Organizing Yourself, Your Office and Your Life, by Liz Davenport (Three Rivers Press, 2001).
- The Procrastinator's Handbook: Mastering the Art of Doing It Now, by Rita Emmett (Walker & Co., 2000).
- Execution: The Discipline of Getting Things Done, by Ram Charan, Charles Burck, Larry Bossidy (Crown Business, 2002).
- Managing in a Flexible Workplace, by Barney Olmstead and Suzanne Smith (Amacom Books, 1997).
- If You Haven't Got the Time to Do it Right, When Will You Find the Time to Do it Over?, by J Mayer (Simon & Schuster, 1990).
- PDI's Successful Manager's Handbook (1992).
- Becoming a Strategic Leader: Your role in Your Organization's Enduring Success, by Richard L. Hughes and Katherine M. Beatty (Jossey-Bass, 2005).
- How to Win Friends and Influence People, by Dale Carnegie (New Edition: Pocket, 1998; Original: Simon & Schuster Trade, 1981) – also available on audio CD.
- Implementing Mentoring Schemes, by Nadine Klasen and David Clutterbuck (Butterworth-Heinemann, 2001).
- Team Building: How to Motivate and Manage People (Career Track Publishing, 1995).
- Learning to Solve Problems: An Instructional Design Guide, by David H. Jonassen (John Wiley & Sons Canada, 2003).
- Credibility: How Leaders Gain and Lose It, Why People Demand It, by James M. Kouzes and Barry Posner (Jossey-Bass, 1993).
- If You Haven't Got Time To Do It Right, When Will You Find Time to Do it Over? by J. Mayer (Simon & Schuster Trade, 1990).

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SHOW PASSION, ENTHUSIASM AND DEDICATION

Definition

The belief in and passion for enhancing the lives of individuals who are deafblind by being a champion for them and enabling them to live rich, meaningful lives. It is about demonstrating, through words and actions, a true commitment to supporting and promoting the interests and priorities of individuals who are deafblind, the agency and the sector as a whole.

LEVEL 1	Believe in providing service to those who are deafblind
LEVEL 2	Do what's right for individuals who are deafblind, the agency and the sector
LEVEL 3	Demonstrate strong personal conviction and commitment
LEVEL 4	Place the highest priority on moving the sector forward

This Means...	This Doesn't Mean...
• Openly and directly confronting others who are exhibiting behaviour that is not in the agency's/sector's best interests	• Not responding to or addressing others who exhibit unethical behaviour, particularly if it is a close colleague
• Demonstrating personal commitment toward Intervenor Services	• Focusing only on your personal agenda without looking at the impact on consumers and Intervenor Services
• Demonstrating the actions that support the consumers and services provided	• Going through the motions or complaining about things that happen, but not dealing with it directly

Activities

LEVEL 1	Believe in providing service to those who are deafblind

Be authentic and broaden your own self-awareness.
- Seek opportunities to strengthen your self-insight; share who you are, and what you believe in;
- Think carefully about your personal strengths and weaknesses. Consider the impact these have on the contribution you make to the agency; and
- State openly and sincerely your personal position or opinions. Avoid giving evasive or tentative responses to questions.

Work with others who have strong opinions.
- Participate in assignments or projects working with others who have strong opinions, styles that are different from yours, or who have more expertise in the project area than you do; and
- Use these opportunities to practice being more flexible and to manage yourself in a way that adapts to another person and their working style.

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Keep your manager informed of any new creative ideas you are pursuing.
- Be proactive in making sure your manager is fully aware of new concepts and initiatives you are learning; and
- Solicit his/her support and advice in completing tasks, removing roadblocks, and contacting others.

LEVEL 2	Do what's right for individuals who are deafblind, the agency and the sector

Make agency recommendations and/or changes to meet the needs of specific situations (e.g. changes in funding, delivery of services).
- Build your business case for the change by preparing a proposal that includes the benefits and obstacles to overcome, a list of required resources, timelines, and return on investment for review by key stakeholders.

Discuss the underlying reasons behind rules and procedures with your manager.
- Ask your colleagues about times they have had to bend the rules to solve a problem for a person who receives support and find out what occurred as a result; and
- Do not bend rules unless you understand the implications of bending them. Learn more about the existing rules, and talk to your manager about what would happen if certain procedures were changed.

Demonstrate respect for others.
- Monitor the way in which you speak about people who receive services/partners and members of the team;
- Check yourself to ensure that you speak positively about the strengths and capabilities of others; refrain, whenever possible, from criticizing others in your conversations;
- Deal directly with individuals with whom you are displeased with rather than complaining to others; and
- Refrain from engaging in conversations with others who do not follow these guidelines.

LEVEL 3	Demonstrate strong personal conviction and commitment

Use the technique of scenario planning to identify and explore alternative future environments for your own department or the agency as a whole.
- For a difficult, strategic decision, create scenarios or stories about the future, each one modeling a distinct, plausible possibility for the future;
- Bring together a group of key stakeholders who will contribute a wide range of perspectives to agree on the issue to be addressed;
- Identify the driving and constraining forces related to four key areas associated with the issue (i.e. social, economic, political, or technological) and
- Use these scenarios to illuminate the short-term and long-term risks and opportunities associated with specific decisions and investments, as well as to explore emerging opportunities for services and new markets.

Develop an influence plan to establish common ground between the agency's needs, and the needs of the people who receive services.
- During the planning stage, spend plenty of time identifying who you must get support from and how you can most effectively influence them; and
- Until this becomes second nature, outline the steps you will take and what you will communicate in your approach to all the key players. Review and follow this influence plan as you proceed to accomplish your objective.

Keep track of issues and concerns affecting the individuals
- Always know the consumer's broader issues;
- Talk to them about their concerns, not just the services or projects you currently have a mandate to deliver against;
- Keep up-to-date with what's happening in the broader sector by talking to the consumer regularly, reading business magazines and publications, meeting with other colleagues, and discussing with the consumer about the critical short and long-term issues you are facing; and
- Act as a sounding board for them.

LEVEL 4	Place the highest priority on moving the sector forward

Link planning to the agency's strategic vision.
- Effective planning requires a deep understanding of the strategic intent and the underlying processes necessary to achieve these goals. To better understand and link your agency's strategic vision to the team's work, consider the following steps:
    * Be able to articulate your agency's vision, strategic direction and goals?
    * What industry are we in? What is our sustainable competitive advantage?
    * What processes are critical to our success?
    * What role does my team play in the success of the agency?

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- ▪ If you can't answer these questions, discuss these with your manager.
- ▪ Communicate this information to those you supervise/lead so that they understand the agency's direction. They will need this information to set their own goals and/or guide their teams.

Test a new idea or concept with others that would be unique/different in your service area relative to the industry.
- ▪ Determine its application within your department by following the steps below:
  - * Develop a plan for its implementation, even if you believe the idea may not be supported;
  - * Test the plan with your manager and trusted colleagues and get their feedback;
  - * Identify key learnings from the exercise and
  - * What changes are necessary to your plan to make it viable?
- • Assess the feasibility of the plan and determine if there is merit to proceeding further

Proactively develop a network to support the needs and objectives of the agency.
- ▪ Build a large network to develop your expertise and the visibility of your agency;
- ▪ Identify individuals internal or external to your agency whose expertise you can use to develop your own agency or that of the sector as a whole; and
- ▪ Exchange ideas and expertise on a regular basis to keep up to date on sector trends, patterns and changes related to your service area.

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Resources

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Book(s)
- • 7 Ways Successful and Fulfilled People Think Differently by Thai Nguyen (2016). https://www.entrepreneur.com/article/237866
- • If You Love Them Set Them Free by Deloitte University Press (2017). https://www2.deloitte.com/content/dam/insights/us/articles/2725_if-you-love-them-set-them-free/DUP_If-you-love-them-set-them-free.pdf
- • Leading with Passion by Kristin Baird (2007). http://baird-group.com/articles/leading-with-passion-three-keys-to-sharing-your-enthusiasm
- • Lost Passion for Your Work? by David K. Williams (2016). https://www.forbes.com/sites/davidkwilliams/2016/09/26/lost-your-passion-for-work-its-your-fault-and-how-to-get-out-of-your-rut/#430744d4fb3b
- • How to Find Passion in Your Job by Tina Su (2008). http://thinksimplenow.com/happiness/how-to-find-passion-in-your-job/
- • 10 Ways to Cure Your Boredom at Work by Whitson Gordon (2013). https://lifehacker.com/5993776/top-10-ways-to-cure-your-boredom-at-work
- • 10 Ways to Rekindle Your Passion for Work by Michael Poh. https://www.hongkiat.com/blog/rekindle-work-passion/
- • Reawakening Your Passion for Work by Boyatzis, McKee, Goleman (2002). https://hbr.org/2002/04/reawakening-your-passion-for-work
- • Getting Passion out of your Profession, Nina Spencer

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- Good to Great Jim Collins 2001
- Deaf-blind Infants and Children – A developmental Guide – J.M. Innes and J.A. Treffry
- Story of my Life Helen Keller
- Deafblind Reality: Living the life Scott M Stoffel
- Enthusiasm: Simple And Effective Strategies On How To Create More Enthusiasm For Life (Build Confidence, Create Habits, How To Talk To Anyone, Find Your Passion)
- The Leadership Challenge: How to Make a Difference by Kouzes and Pozner
- Making a Difference By Gillard
- Playing Big By Mohr

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- Jobs, S. (2008) Stanford. Retrieved from:
  https://www.youtube.com/watch?v=UF8uR6Z6KLc&index=8&list=PL70DEC2B0568B5469
- Getting Passion out of your Profession, Nina Spencer
- The Fish Philosophy. Retrieved from https://www.youtube.com/watch?v=_AAQT6ifGys;
  http://www.fishphilosophy.com/

HOLD SELF AND OTHERS ACCOUNTABLE

The ability to hold oneself and others accountable for meeting the highest standards. It involves consistently monitoring one's own and others' performance, and appropriately and effectively taking corrective action to improve performance.

LEVEL 1	Hold self accountable
LEVEL 2	Communicate performance expectations
LEVEL 3	Monitor performance
LEVEL 4	Address performance issues

This Means...	This Doesn't Mean...
▪ Holding people accountable to deliver against high standards and confronting them when their performance is not up to standard	▪ Being reluctant to risk upsetting an employee by telling them when their performance is inadequate
▪ A "clear and firm approach" to what must be done in a crisis situation or when other means of influence have not succeeded in achieving important results	▪ Ordering staff around in an inappropriate manner, showing little respect
▪ Clearly explaining to others when their expectations are unreasonable or are at odds with the strategic direction of the agency	▪ Complaining about inappropriate requests from others but not directly talking to them about it

LEVEL 1	Hold self accountable

Think about your performance in terms of holding others accountable. Are there areas where you have difficulty creating accountability?

▪ Consider the following reasons for avoiding holding people accountable and try out some of the suggested actions:
  ⇒ You have difficulty determining what to do (e.g., preparing the agency's/department's operating plan). Try breaking down the task or assignment into specific steps before explaining it to others;
  ⇒ You rely on others for direction before you have determined what to do. Determine why you rely on others (e.g. for additional information) and take that action on your own.
  ⇒ You second guess yourself and lack confidence in the direction (e.g. performance management decisions). Try standing by your course of action once you have made it;
  ⇒ You use tentative language when communicating direction or saying "no." Try to tape record yourself or ask others for feedback on the words you use and the mode of delivery;

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$\Rightarrow$ You are unclear about your own standards and limits for high performance and for acceptable behaviour. Ask yourself what your standards are. List them; and

$\Rightarrow$ You are afraid of how others might react to you being directive with them. Recognize that not everyone will like your direction or your decisions.

Observe your manager dealing with a performance issue

- Note the effective techniques he or she uses with the person; and
- Debrief the interaction afterward. Describe what you observed and ask your manager to explain what he or she was thinking and feeling at the time.

Maintain clear communication

- Clearly communicate how each person's role contributes to the overall success of the group;
- Establish "ground rules" for interaction between group members so that the team works cohesively to accomplish its goals; and
- Help the group stay focused on its common goals. It is essential to continually clarify roles and responsibilities as they change or evolve based on the needs of the agency, people who receive support and the sector as a whole.

| LEVEL 2 | Communicate performance expectations |

Provide clear direction when delegating tasks

- Delegating tasks employees/direct reports helps them develop their skills and frees up some of your own time for new activities. When delegating it is important to provide clear, specific direction to them and monitor their performance;
- Ask others for feedback on the clarity and completeness of your direction during a task or assignment;
- Ask them to summarize the objectives and instructions to be sure that they are clear to them;
- Create ways of monitoring progress;
- Determine what information you require to monitor performance levels in your team. You should consider:
    * What information needs to be shared with the team?
    * How you can encapsulate key performance information for the team in an interesting or unique manner?
    * When should check points happen?
- Work with your information technology department to develop reports that will help you to track and communicate this information over time.

Identify a mentor who successfully sets clear goals/objectives and expectations and then holds people accountable for achieving them.

- Observe his or her behaviour; note the techniques used;

- If possible, meet with the individual to discuss their approach to delegating and ensuring things get done to the standard expected;
- Try to model their behaviour when you need to provide direction or are discussing a performance issue or concern;
- Assess whether you have been successful in implementing these new techniques; and
- Discuss your assessment with your mentor and ask for further feedback and advice.

Keep track of situations where you feel you were strong (or weak) at setting expectations for an individual or team.
- Using the input of your colleagues, review each situation and identify those where you could have been more firm or clear on expectations;
- Ask your colleagues to consider your situation and determine whether you were sufficiently (or overly) directive;
- Create a list of the techniques or strategies with your colleagues that would improve situations where you should have been more directive, setting firmer limits;
- Plan how you will more effectively hold others accountable for doing what you have asked them to do; and
- Ask your direct reports for feedback on specific situations. Refer to the "This Means/This Doesn't Mean" section to generate specific questions to help you probe for feedback.

LEVEL 3   **Monitor performance**

Identify someone whose performance falls short of the standards they should be achieving. Commit to raising the standard.
- Ask for input and views from the individual to uncover any unknown obstacles to effective performance;
- Ask the individual to prepare an appropriate improvement plan, or prepare one together;
- Decide how you will monitor the individual's performance;
- Discuss your actions with your manager or Human Resources, if appropriate;
- Explain clearly to the individual that you intend to raise the standards and that you expect them to achieve this higher standard of excellence. Review the specifics and your expectations with the individual;
- Jointly agree on a review plan;
- Monitor their performance and follow up; and
- Prepare what feedback you are going to provide to the individual.

Clarify team priorities and standards of performance
- Hold a meeting to increase understanding and buy-in for team goals;
- Work with the team to brainstorm existing and future projects and initiatives;
- Prioritize these projects and initiatives together based on specific criteria such as:
    - $\Rightarrow$ How directly they relate to the team's wider strategic goals.

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⇒ The impact they should have on team performance.

⇒ Timing and likelihood of measurable results.

- Jointly create key performance indicators for each project/initiative and performance standards for the team as a whole;
- Agree on mechanisms and accountabilities for measuring performance against these criteria over time; and
- Record the outputs from your meeting in a Team Performance Plan.

Assess whether you are creating an environment where people feel individually and jointly accountable for performance

- Ask for feedback from the team, either at a team meeting or by survey, to see if they think people feel personally accountable for helping the team to meet its stated goals and objectives;
- Do you feel that you have a good understanding of the unique concerns, issues and motivators that affect individuals' performance?
- Do team members notice when they lose focus or lower their performance standards? Do they address it with you or with the individual directly?
- Do team members celebrate team and individual success, giving credit where credit is due?

LEVEL 4	Address performance issues

Prepare for a difficult conversation with an employee/direct report, where the possible consequences of non-performance will be discussed

- Write a purpose statement for the task or assignment. Be sure to include:
  ⇒ the objectives;
  ⇒ key steps to completion;
  ⇒ date and time by which the task or assignment should be completed;
  ⇒ clearly stated consequences of succeeding or failing to succeed;
- Discuss the task or assignment with the direct report/employee, emphasizing the consequences of non-performance; and
- Ask the direct report to summarize the objectives and instructions to ensure they have clearly understood the expected outcomes.

Conduct a thorough review of all employee performance records, including any performance improvement plans (if applicable) before initiating the termination of an employee

- Meet with Human Resources to gather all of the employee's performance records, including any outstanding performance improvement plans; and
- In reviewing these employee records, ensure there is alignment and consistency between observed and documented behaviours and performance problems.

Take clear and concise action to rectify behavioural problems

- Always discuss the "how" not the "who" of the issue.

- Ensure the implications/outcomes of further performance deficiencies are clearly understood by the employee;
- Help the employee see the gaps between what is required and what they have achieved;
- Put formal plans in place as needed; and
- Once all other remedies are exhausted, have the courage to terminate an employee for the betterment of the department, agency and team.

Resources

Book(s)

- **How did That Happen? Holding People Accountable for Results the Positive, Principled Way**, by Roger Conners, Tom Smith
- **Discipline Without Punishment**: *The Proven Strategy that Turns Problem Employees Into Superior Performance, by Dick Grote (New Edition: AMACOM, 2006; Original: AMACOM, 1995).*
- **Crucial Confrontations**, *by Kerry Patterson, Joseph Grenny, Ron McMIlan & Al Switzler, (McGraw-Hill, 2004) – also available on audio CD.*
- **Coward's Guide to Conflict: Empowering Solutions for Those Who Would Rather Run than Fight**, *by Timothy Ursiny (Sourcebooks Trade, 2003) – also available on audio CD.*
- **Fierce Conversations: Achieving Success at Work and in Life, One Conversation at a Time**, *by Susan Scott, (New Edition: Berkley Trade, 2003; Original: Viking Press, 2002) – also available on audio CD.*
- **How to Become a Great Boss: The Rules for Getting and Keeping the Best Employees,** *by Jeffrey J Fox, (Hyperion Press, 2002) – also available on audio CD.*
- **The One Minute Manager**, *by Kenneth Blanchard & Spencer Johnson (Trade Paperback: Zebra Bouquet, 2002; Original: Berkley Publishing Group, 1987) – also available on audio CD.*
- **Putting The One Minute Manager To Work**, *by Kenneth Blanchard & Spencer Johnson (Berkley Publishing Group, 2002) – also available on audio CD.*
- **The Power of Positive Confrontation: The Skills You Need to Know to Handle Conflicts at Work, at Home and in Life**, *by Barbara Pachter & Susan Magee (Marlowe & Company, 2001).*
- **The Leadership Pill: The Missing Ingredient in Motivating People Today**, *by Ken Blanchard, Marc Muchnick (Free Press, 2003).*
- **Critical Thinking: Tool for Taking Charge of Your Professional and Personal Life,** *by Richard W. Paul & Linda Elder (Prentice Hall, 2002).*
- **High Performance Leadership: Creating, Leading and Living in a High Performance World**, *by Graham Winter (John Wiley & Sons Canada, 2003).*
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- **Managers as Mentors: Building Partnerships for Learning**, *by Chip R. Bell (Trade Paperback: Berrett-Koehler., 2002).*
- **Mentoring At Work: Developmental Relationships in Organizational Life**, *by Kathy E. Kram (University Press of America, 1988).*

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- ***Difficult Conversations: How to Discuss What Matters Most****, by Douglas F. Stone, Sheila Heen & Bruce Patton (Pengin Books, 2000).*
- ***The 8 Keys of Excellence: Principles to Live By, by Bobbi DePorter (Learning Forum, 2000).***
- ***Credibility: How Leaders Gain and Lose It, Why People Demand It****, by James M. Kouzes and Barry Posner (Jossey-Bass, 1993).*
- ***The First 90 Days: Critical Success Strategies for New Leaders at All Levels****, by Michael Watkins (Harvard Business School Press, 2003).*
- ***The Leadership Pill: The Missing Ingredient in Motivating People Today****, by Ken Blanchard, Marc Muchnick (Free Press, 2003).*
- ***How to Become a Great Boss: The Rules for Getting and Keeping the Best Employees****, by Jeffrey J Fox (Hyperion Press, 2002)*
- ***If You Haven't Got Time To Do It Right, When Will You Find Time to Do it Over?*** *by J. Mayer (Simon & Schuster Trade, 1990).*
- ***Making Strategy Work: Leading Effective Execution and Change****, by Lawrence G. Hrebiniak (Wharton School Publishing, 2005).*
- ***Critical Thinking: Tool for Taking Charge of Your Professional and Personal Life,*** *by Richard W. Paul & Linda Elder (Prentice Hall, 2002).*
- ***The Transparent Leader: How to Build a Great Company Through Straight Talk, Openness and Accountability*** *by Herb Baum and Tammy King (Harper, 2005)**.***
- ***Integrity: The Courage To Meet The Demands Of Reality*** *by Henry Cloud (Harper, 2009)**.***
- ***Credibility: How Leaders Gain and Lose It, Why People Demand It****, by James M. Kouzes and Barry Posner (Jossey-Bass, 1993).*
- ***The Assertiveness Workbook: How to Express Your Ideas and Stand Up for Yourself at Work and in Relationships****, by Randy J Paterson, (New Harbinger Publications, 2000).*
- ***Difficult Conversations: How to Discuss What Matters Most****, by Douglas Stone, Bruce Patton & Sheila Heen (Guinness Publishing , 2000) – also available on audio CD.*

Videos
- "Assertiveness Skills for Managers and Supervisors" (CareerTrack Publications, 1-800-780-8476, www.pryor.com).
- "Dealing with Employee Discipline and Performance Problems" (CareerTrack Publications, 1-800-780-8476, www.pryor.com).
- "Feedback Solutions Series" by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Giving Feedback, Advanced Skills" by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "How to Delegate Work and Ensure it's Done Right" (CareerTrack Publications, 1-800-780-8476, www.pryor.com).
- "Managing Problem People Series" by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Goal: The Dramatic Story" by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

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- Career Concepts. www.careerconcepts.ca
- "How to prepare for Difficult Conversations" webinar, full day workshop
- "How to Create Professional Boundaries" webinar, full day workshop
- Training Evolution: www.training-evolution.com. "The Accountability Clinic"
- Uniquedevelopment.com; Session 7 – webinar: Accountability, Empowerment and Training

LEAD AND DEVELOP OTHERS

The ability to energize and develop agency staff, creating a climate in which they are motivated to do their best.

LEVEL 1	Provide clarity
LEVEL 2	Enable the team to function effectively
LEVEL 3	Engage and empower the team
LEVEL 4	Communicate a compelling vision and sense of purpose

This Means...	This Doesn't Mean...
▪ Keeping team members informed about decisions and explaining the rationale behind them	▪ Dictating orders and giving incomplete information
▪ Actively promoting the mission and goals of the department as it relates to the strategic direction of the agency	▪ Delegating tasks to others without providing them with an understanding of the ultimate goal
▪ Seeking out work opportunities that will challenge your direct reports, enable them to learn new skills, and empower them to take the lead in developing themselves	▪ Keeping tight control over your direct reports' actions and only assigning work that you know they will do well and efficiently because they have done similar assignments many times before

Activities

LEVEL 1	Provide clarity

Work with direct reports to identify the strengths and development needs that they will need to work on over the next year.
- Meet individually with each member of your team;
- Ask each individual to describe in his/her own words their proposed development opportunities
  - ⇒ What are the individual's goals?
  - ⇒ What skills/behaviours must the individual demonstrate to reach those goals?
- Agree on a plan that incorporates both your input and the employee's/ direct report's suggestions;
- Commit to providing that support (e.g. training courses, books, your time, etc.);
- Discuss how you can support the employee in his or her development; and
- Provide your perspective on the development plan.

Practice the following skills and behaviours to manage conflict among the team in a positive way
- Emphasize common goals, and how everyone depends on each other;

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- Treat each person with respect;
- Help to define the problem by coaching others to be concise and stick to facts; coach them to avoid repeating the same points over and over;
- Insist on true consensus;
- Warn team members to avoid situations where people give in out of sheer exhaustion;
- Use group pronouns (we, us, ours); and
- Always thank team members for their participation.

Create a clear and effective team vision for change that captures the hearts and minds of employees.

- John Kotter identifies six characteristics of an effective vision. Review these characteristics and incorporate as many as you can as you draft your vision and strategy. Effective visions:
    - * Convey an imaginable picture of what the future will be like;
    - * Appeal to the long term interests of people;
    - * Consist of realistic, attainable goals;
    - * Are clear enough to guide decision making;
    - * Are flexible enough to allow individual initiative as well as adjustments to changing circumstances; and
    - * Are easy to explain.

| LEVEL 2 | Enable the team to function effectively |

Ask team members to evaluate the effectiveness of the team. Ensure that they identify both strengths and weaknesses

- Evaluation criteria may include the following:
    - * Clarity of Purpose
    - * Problem Solving
    - * Decision Making
    - * Change
    - * Focus on People who Receive Support
    - * Quality of Work
    - * Conflict Resolution
    - * Work Processes
    - * Feedback
- Rate the team using the following scale for each criterion:
    - * 1 = Team is Not at all Effective
    - * 2 = Team is Slightly Effective
    - * 3 = Team is Effective in Some Situations but Not Others
    - * 4 = Team is Effective Most of the Time
    - * 5 = Team is Effective All of the Time
- Review results every three months. Plan to spend some time working on the areas that fall into level 1 or 2 on the scale.

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- During the review, consider the evaluation criteria. Should anything else be added to the list? Are any criteria no longer relevant?Repeat the exercise every three months to see if perceived team

Establish a work environment with clear direction where team members have performance objectives
- These objectives should be (**SMART**):
    - * **S**pecific: describes what the end result will look like
    - * **M**easurable: expressed in quantifiable terms
    - * **A**ttainable: the goal is realistic
    - * **R**elevant: linked to organization or unit goals
    - * **T**imeframe: provide target completion dates
- Ask team members for their input when developing the objectives;
- Compare performance to the standards you have set in each area of accountability on a regular basis (e.g., quarterly, annually); and
- Take action to meet with those employees who have difficulty meeting the objective criteria and provide support around ways of improving performance.

Identify challenging developmental/learning opportunities for your employees to facilitate their growth.
- Talk to each of your employees to get a sense of where their interests lie, and where they believe they can add more value to the area than they are currently providing;
- Refer to their most recent performance appraisals as an indication of the sorts of activities they could become involved in, based on their experience and capabilities;
- Look for challenging assignments that will provide them with greater exposure in the organization and opportunities to develop their skills and abilities. This could include standing in for you at meetings, acting on cross-functional task forces or becoming involved in special projects. Remember that these opportunities may exist outside your department/business unit, as well, and could benefit the broader organizational mandate;
- Propose these opportunities to the direct reports, explaining why you think it is important for them to develop in these areas (be as specific as you can), and encourage them to take a risk; and
- Ensure you are available to support them throughout the activity with time and advice.

LEVEL 3	**Engage and empower the team**

Determine where to focus your coaching efforts.
- Use the management planning grid below to determine the extent of involvement you should consider giving to the team and each individual given their skills, knowledge, competencies, and their willingness to adapt to change:

Management Planning Grid

- Encourage expression of feelings - Ask for ideas and suggestions - Provide moderate feedback - Be direct in conveying consequences - Hold frequent group meetings	- Encourage sharing of ideas, suggestions, options - Ask group to decide frequency of meetings - Delegate important responsibilities
- Give information and direction - Provide detailed instructions and moderate feedback - Monitor closely - Be direct in conveying consequences - Hold frequent group meetings	- Encourage discussion and sharing - Provide detailed instruction and high levels of feedback - Hold frequent meetings - Involve in brainstorming, idea generation on specific issues - Delegate "safe" responsibilities

Create and implement long term plans for developing employees.
- Write down some clear goals that you would like to achieve in developing employees over a longer term period (one to three years). For example, you might set a goal to develop new employees so that over time they would be comfortable in taking the lead in a group project, able to deal effectively with even the most difficult people who receive support, and regularly approaching work in an analytical way;
- Track their progress over time and assess how well you are doing;
- Remember to be patient with them and yourself. It takes time for someone to mature and develop; and
- Recognize successes. If an employee you have developed is promoted or handles a project particularly well, take a moment to recognize a supporting role.

Foster an environment where your direct reports take ownership of the development of their respective teams.
- Address such issues as:
  - ⇒ What are their personal and team goals?
  - ⇒ What skills must they personally develop to reach their team goals?
  - ⇒ What do you see that supports or contradicts these goals?
  - ⇒ Are their goals challenging enough?
  - ⇒ What can you and the organization do to help direct reports achieve their goals?
- Ask them to identify objectives or targets that will help deliver to your overall profit plan;

- Ask your direct reports to provide you with regular updates on their progress. If a key result is falling short of target, work with them to identify specific actions to get it back on track;
- Schedule regular individual discussions with employees/direct reports who have performance coaching responsibilities to discuss the progress of their teams as well as the achievement of their own personal goals;
- Set challenging but realistic objectives and target deadlines with your employees; and
- Start with objectives where there is a high probability of attainment to build momentum and the individual's confidence in his/her own abilities.

LEVEL 4	Communicate a compelling vision and sense of purpose

Provide rehearsal opportunities for direct reports who have coaching responsibilities.
- Some employees may want to practice giving feedback or assessing performance before they do it with team members or direct reports. Offer to play the role of the employee who is receiving coaching;
- Discuss which areas of the process concern the employee most, and the reasons for their concern (e.g., lack of practice, sensitivity to personal dynamics, history of challenging coaching sessions, etc.);
- Discuss the guidelines or patterns you have identified in your own practice of coaching or assessment. Make sure you allow plenty of opportunities for questions and analysis of the situation the employee is facing. The purpose is not to make a "coaching clone" but rather to give him/her some possible approaches to the situation, and some idea as to what to look for, to know whether the session is going well or needs to be redirected;
- Role-play the situation, responding in a number of ways so that the employee gets practice in dealing with different kinds of responses. Do not make it too easy or too hard for him/her to try out the guidelines you have discussed; it needs to feel realistic. Allow opportunities to "stop the action" if he/she needs to ask other questions or check on the direction of the process; and
- Check back with the employee after he/she has held the real session. Help them to go through the same process of self-examination as you did, so they gain from their experience, and can begin to internalize the guidelines and indicators of success or difficulty.

Be supportive of employee's/ direct report's efforts to try new ideas, test new abilities, or exercise authority.
- Provide support in the form of financial resources, time, feedback, reinforcement, encouragement, and other forms of coaching;
- Remember to tailor your support to the individual's learning style;
- If a new idea or project does not work, be sure to offer reassurance; and
- Maintain open communication with the individual so that they will feel comfortable approaching you with any questions or concerns.

Arrange challenging assignments.

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- Look for opportunities that will stretch people rather than just safe bets;
- Accept that there will be mistakes and failures. If none of the team ever fail at a task, may be you haven't been giving them challenging enough assignments;
- Accept that these assignments will cause some anxiety to the staff. If people are not concerned that the assignment may be too big for them, it is not a real challenge. If they are concerned, help them work through the project requirements and make sure they have the necessary resources to do a good job;
- Monitor an employee's performance on competencies you are helping them to develop and give them feedback during coaching sessions;
- Frequently observe their behaviours in order to provide an objective assessment of their strengths and weaknesses. Keep a journal to record your thoughts regarding their development needs and progress on the competencies they are working on;
- Think about how to deliver your feedback before the coaching discussion so that it is non-evaluative, specific, and behavioural.
  ⇒ Describe the behaviour you are recognizing and avoid general statements such as "You did a good job". General statements do not provide meaningful information sufficient for development;
- Ask the employee about their thoughts on your feedback; and
- Guide them to commit to a development effort.

<div align="center">

Resources

</div>

Book(s)

- Death by Meeting: A Leadership Fable about Solving the Most Painful Problem in Business, by Patrick Lencioni (Jossey-Bass, 2004)
- The First 90 Days: Critical Success Strategies for New Leaders at All Levels, by Michael Watkins (Harvard Business School Press, 2003).
- Why Smart Executives Fail: And What You Can Learn from Their Mistakes, by Sydney Finkelstein (Portfolio, 2003).
- The Leadership Pill: The Missing Ingredient in Motivating People Today, by Ken Blanchard, Marc Muchnick (Free Press, 2003).
- Heroic Leadership: Best Practices from a 450-Year-Old Company That Changed the World, by Chris Lowney (Loyola Press, 2003).
- The Leadership Challenge, 3rd Edition, by James M. Kouzes and Barry Z. Posner (Jossey-Bass, 2003).
- Primal Leadership: Realizing the Power of Emotional Intelligence, by Daniel Goleman, Richard Boyatzis and Annie McKee (Audio Renaissance, 2002).
- High Performance Leadership: Creating, Leading and Living in a High Performance World, by Graham Winter (John Wiley & Sons, 2002).
- The Five Dysfunctions of a Team: A Leadership Fable, by Patrick M Lencioni (Jossey-Bass, 2002).
- How to Become a Great Boss: The Rules for Getting and Keeping the Best Employees, by Jeffrey J Fox (Hyperion Press, 2002)

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- Implementing Mentoring Schemes, by Nadine Klasen and David Clutterbuck (Butterworth-Heinemann, 2001).
- Best Practices in Organization Development and Change: Culture, Leadership, Retention, Performance, Coaching, by Louis Carter, David Giver and Marshall Goldsmith (Editors) (Jossey-Bass/Pfeiffer, Book and CD-ROM Edition, 2001).
- The Spirit of Leadership: Optimizing Creativity and Change in Organizations, by Robert Spitzer (Executive Excellence, 2000).
- Coaching, Counselling and Mentoring: How to Choose the Right Technique to Boost Employee Performance, by Florence M. Stone (2nd Edition: AMACOM, 2007; Original: AMACOM, 1999).
- Coaching Life Changing Small Group Leaders, by Bill Donahue and Greg Bowman (Zondervan, 2006).
- Coaching for Leadership, by Marshall Goldsmith and Laurence Lyons (New Edition: John Wiley & Sons, 2005, Jossey-Bass/Pfeiffer, 2000).
- Coaching for Meaning: The Culture and Practice of Coaching and Team Building, by Vincent Lenhardt (VHPS Palgrave, 2004).
- Behavioural Coaching, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2003).
- High Performance Leadership: Creating, Leading and Living in a High Performance World, by Graham Winter (John Wiley & Sons Canada, 2003).
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- Managing Employee Well-Being: A Guide for Human Resources Managers, by Donald Currie (Spiro Press, 2003).
- Managing the Mavericks: Nurturing Key Talent, by Kaye Thorne (Spiro Press, 2003).
- Coaching and Counselling, by Marianne Minor (New Edition: Crisp Publications Inc., 2002; Original: Crisp Publications Inc., 1989).
- Coaching for Performance: Growing People, Performance and Purpose, by John Whitmore (3rd Edition: Nicholas Brealey, 2002).
- Managers as Mentors: Building Partnerships for Learning, by Chip R. Bell (Trade Paperback: Berrett-Koehler., 2002).
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- Executive Coaching: Developing Managerial Wisdom in a World of Chaos, by Richard R. Kilberg (APA, 2000).
- The Mentor's Guide, by Lois Zachary (Jossey-Bass, 2000).
- The Complete Guide to Coaching at Work, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2000).

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Video(s)

- "1001 Ways to Energize Individuals", by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Art of Coaching in Business", (Greylock Associates, 888-279-4857).
- "Breaking the Delegation Barrier" (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Changing Role of Supervisor", by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Coach", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching and Performance Feedback Series", by QMR (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching for Success", by FT Knowledge (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching for Top Performance", by AMA Video (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching from the Heart", by Training Edge (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching on the Job", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching Through Facilitation: The New Way to Manager", by Videolearning Systems (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Coaching To Encourage Flexibility", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Courage To Coach", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Dimensions of Coaching", by Workplace Publishing (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Empowering Others Part 1 of 2" (AMA Partnership Services on Empowerment).
- "Feedback Solutions Series", series of 4 (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Giving Feedback - Advanced Skills" (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "Great Beginnings: The Employer's Perspective", by Mind Resources (International Tele-Film, 1-800-561-4300, www.itf.ca).
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- "Painless Performance Improvement", by Media Partners Corp. (International Tele-Film, 1-800-561-4300, www.itf.ca).
- "The Practical Coach", Media Partners (International Tele-Film, 1-905-842-4428).
- "Practical Coaching Skills for Managers" (CareerTrack Publications, 1-800-488-0928) [2 hrs. 57 min].
- "Productive Counselling", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).
- 'America3: The Power to Create' (Owen Stewart Performance Resources Inc, www.owenstewart.com, 1-800-263-3399)
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