

Quick Course Outline

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Self-Directed Quick Course

Collaborative Leadership

Brought to you by
Georgia Health Policy Center



Welcome!

Welcome to your very own Collaborative Leadership Quick Course. It's expected that this Quick Course is either self-directed (by you) or facilitated in a group setting by a member of your program team.

The leadership decisions and actions you and your team make are crucial to the success of your program and its future sustainability. This course addresses the basics of collaborative leadership as they relate to sustainability, contains a simple collaboration self-assessment, and provides a template for creating a collaboration plan for your program.

Basics and FAQs of Collaborative Leadership

What's the difference between leadership and collaborative leadership?

Leadership means different things to different people. Throw in the term collaborative leadership, and you may be even more confused. Use the table below to compare and contrast the terms leadership and collaborative leadership.

Leadership	Collaborative Leadership that positions for sustainability
<ul style="list-style-type: none">○ Gets great results○ Grows people○ Uses resources wisely○ Fulfills goals	<ul style="list-style-type: none">○ Leadership plus...○ Creates a shared vision○ Accesses the talents, connections, and ideas of others○ Understands the value of influence

Basics and FAQs of Collaborative Leadership

What does a collaborative leader do?

Collaborative leaders do many things. For our purposes, we can boil it down to achieving three major results:

1. Knowledge of Program
2. Interdependence of Resources
3. Influence Outside of Project

How do they achieve these results?

Typically, it is by implementing the six practices of a collaborative leader:

1. Assessing the Environment: Understanding the context for change before you act.
2. Creating Clarity: Defining shared values and engaging people in positive action.
3. Building Trust: Creating safe places for developing shared purpose and action.
4. Sharing Power and Influence: Developing synergy of people, organizations, and communities to accomplish shared vision.
5. Developing People: Committing to people as a key asset through coaching and mentoring.
6. Self-Reflection: Understanding your own values, attitudes, and behaviors as they relate to your leadership style and its impact on others.

Collaboration Mini Self-Assessment

Use the assessment below to help gauge the collaboration efforts of your program.
Read each statement, and rate the program on a scale of 1 to 5.

Competency Area	Statements	1	2	3	4	5
Knowledge of Program	Those in your organization(s) can accurately explain its mission, overall goals, and activities.					
	Those associated with program are curious about the results and progress.					
	Information and literature associated with the program have a consistent brand and include key points about the program.					
Interdependence of Resources	Our program works closely with related people and organizations to avoid duplicating efforts.					
	Similar or related programs within the area rely on our program's expertise, information, and produced materials.					
	Our program is establishing itself as a recognized, needed, and valued aspect of the community.					
Influence Outside of Project	Influential business, civic, and political leaders recognize the role, value, and accomplishments of our program.					
	Program employees and volunteers share the program's mission, overall goals, activities, and achievements with friends and family.					
	Program participants share their positive interactions with the program with friends, family, and colleagues.					

Determine your score for each of the three competency areas by adding your scores for the statements within the area. Write your scores below.

Knowledge of Program _____

Interdependence of Resources _____

Influence Outside of Project _____

Creating a Collaboration Plan

Now that you're starting to understand collaborative leadership and what it can do for your program, let's figure out where and how you can easily improve the collaborative efforts for your program. Every program has different needs. Below are three options for collaboration plans. Choose the one that best fits the needs of your program, and turn to the corresponding page.

Option 1: Focus on improving one of the three results of a collaborative leader (pg 7)

Knowledge of Program/Interdependence of Resources/ Influence Outside of Project

Option 2: Focus on a specific target within a result (pg 7)

- Knowledge of Program
 - Those in your organization(s) can accurately explain its mission, overall goals, and activities.
 - Those associated with the program are curious about the results and progress.
 - Information and literature associated with the program have a consistent brand and include key points about the program.
- Interdependence of Resources
 - Our program works closely with related people and organizations to avoid duplicating efforts.
 - Similar or related programs within the area rely on our program's expertise, information, and produced materials.
 - Our program is establishing itself as a recognized, needed, and valued aspect of the community.
- Influence Outside of Project
 - Influential business, civic, and political leaders recognize the role, value, and accomplishments of our program.
 - Program employees and volunteers share the program's mission, overall goals, activities, and achievements with friends, family, and colleagues.
 - Program participants share their positive interactions with the program with friends, family, and colleagues.

Option 3: Focus on improving one of the six practices of collaborative leadership (pg 9)

Assessing the Environment/Creating Clarity/Building Trust/Sharing Power and Influence/Developing People/Self-Reflection

Creating a Collaboration Plan

Action Plan Option 1

Could your program benefit from really focusing on one of the three results discussed? If so, choose the result area and start by answering the guiding questions. Feel free to list extra information as you see useful.

Action Plan Option 2

Would you rather focus on a specific statement listed under one of the competency areas? For example, you would like to improve your rating on the statement “Those in your organization(s) can accurately explain its mission, overall goals, and activities.” If so, choose the specific statement upon which you would like to improve, and continue by answering the guiding questions below. Feel free to list extra information as you see useful.

Guiding questions for Options 1 and 2

- Knowledge of Program
 1. Who needs to know?
 2. What key messages and details of the program do they need to know?
 3. How will they learn what they need to know?
 4. When will they learn what they need to know?
 5. In what respect(s) is your program currently making progress toward this result?
 6. What needs to happen or be improved upon to achieve this result?
 7. How could achieving this result benefit your program?
 8. What are the specific things you need to learn more about to improve (whether it be about the practice, itself or your program)?
 9. What specific things do you need to do to achieve this result?
 10. What meetings, events, or discussions do you have in the next few months in which you will have opportunities to make strides toward accomplishing this result?

Creating a Collaboration Plan

- Interdependence of Resources—Assess/Clarify/Build Trust/Share Power and Influence/Develop People/Self-Reflect
 1. With whom should you be partnering to share information, resources, or services?
 2. What information, resources, or services does your program offer?
 3. What information, resources, or services could your program benefit from sharing?
 4. How could your program go about developing relationships with other businesses, groups, or organizations with whom you could share?
 5. When are the opportune times to create these partnerships?
 6. In what respect(s) is your program currently making progress toward this result?
 7. What needs to happen or be improved upon to achieve this result?
 8. How could achieving this result benefit your program?
 9. What are the specific things you need to learn more about to improve (whether it be about the practice, itself or your program)?
 10. What specific things do you need to do to achieve this result?
 11. What meetings, events, or discussions do you have in the next few months in which you will have opportunities to make strides toward accomplishing this result?

Creating a Collaboration Plan

Action Plan Option 3

Do one or more of the six practices of collaborative leadership really strike you as something you would like to polish? Select the practice on which you would like to focus from the list below. Complete the corresponding *Self-Assessment Exercise*, and then return to the guiding questions.

Guiding questions for Option 3:

- Circle the practice you wish to polish, and turn to the page listed to complete the corresponding *Self-Assessment Exercise*. When finished, return to the guiding questions below.
 1. Assessing the Environment (pg 13)
 2. Creating Clarity (pg 14)
 3. Building Trust (pg 15)
 4. Sharing Power and Influence (pg 16)
 5. Developing People (pg 17)
 6. Self-Reflection (pg 18)
- What do you think are your strengths in the practice?
- What do you think are your most important areas for improvement?
- In what ways will improving your skills around this practice benefit you and your program?
- What are the specific things you need to learn more about to improve (whether it be about the practice, itself or your program)?
- What specific things do you need to do to improve in this practice?
- What meetings, events, or discussions do you have in the next few months in which you will have opportunities to improve this practice?

Creating a Collaboration Plan

Drafting the Collaboration Plan (All Options)

A template to capture your collaboration plan is located on page 11. Use the information gathered in the guiding questions to get started on your plan. When completed, the action plan should serve as a tangible reference tool to guide and note your progress toward achieving your goal.

Goal

State the result or practice on which you have chosen to focus. As much as possible, keep your goal SMART:

- Specific
- Measurable
- Attainable
- Realistic
- Timely

Action Steps/Tasks

List the steps/tasks you must complete to accomplish the goal.

Date to Accomplish/Opportunity to Practice

If there is a specific date by which you want or need to accomplish the step/task, list it. Additionally, if there are events or meetings in which you can accomplish the task or practice your skills, list them.

Things to keep in the front of my mind (reminders, key messages, quotes, mantras, etc.)

List any items or reminders you need to look over on a regular basis. These may be the “Why am I doing this again?” answers, your inspirational focus, or the key message you want to convey.

My Collaboration Plan

Goal:

	Action Steps/Tasks	Date to Accomplish/ Opportunity to Practice	Notes:

Things to keep in the front of my mind (reminders, key messages, quotes, mantras, etc.):

Appendix

- Collaborative Leadership Practices: Self-Assessment Exercises

* Sources used: Adapted from *Collaborative Leadership: Fundamental Concepts Learning Module: Facilitator's Guide*. Retrieved July 1, 2008, from Turning Point Collaborative Leadership Web site: <http://www.collaborativeleadership.org/pages/download.html>

Collaborative Leadership Practices

Assessing the Environment

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Plan.

Behaviors		BEHAVIOR FREQUENCY						
		Seldom		Sometimes		Often		Almost Always
1	I use assessment tools in order to systematically learn the needs of the community.	1	2	3	4	5	6	7
2	I ensure that an assessment tool is a good fit for the information that needs to be collected.	1	2	3	4	5	6	7
3	I undertake an appropriate analysis of the data.	1	2	3	4	5	6	7
4	I ensure responsible interpretation of the data.	1	2	3	4	5	6	7
5	I gather information before taking action.	1	2	3	4	5	6	7
6	I encourage people to act on information rather than assumptions.	1	2	3	4	5	6	7
7	I clarify the problem before planning solutions.	1	2	3	4	5	6	7
8	I seek culturally different views of the problem.	1	2	3	4	5	6	7
9	I use a systems perspective to understand the community.	1	2	3	4	5	6	7
10	I look at the perceived problem from different angles before proceeding.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

70 – 61 Excellent Score 40 - 21 Opportunities for Growth
 60 – 41 Stronger Score 20 - 1 Important to Change Behavior

Adapted from *Collaborative Leadership: Fundamental Concepts Learning Module: Participant’s Guide*.

Retrieved July 1, 2008, from Turning Point Collaborative Leadership Web site:

<http://www.collaborativeleadership.org/pages/download.html>

Collaborative Leadership Practices

Creating Clarity

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Action Plan.

Behaviors		BEHAVIOR FREQUENCY						
		Seldom		Sometimes		Often		Almost Always
1	I can describe a personal vision for my community that offers a future achievable with the assets available.	1	2	3	4	5	6	7
2	I facilitate an effective process for exploring the diverse aspirations among community stakeholders.	1	2	3	4	5	6	7
3	I facilitate the development of a shared community vision that is influenced by the views of diverse stakeholders.	1	2	3	4	5	6	7
4	I communicate the shared vision broadly.	1	2	3	4	5	6	7
5	I create a framework for action using systems thinking.	1	2	3	4	5	6	7
6	I facilitate stakeholder teaming to develop strategic action plans.	1	2	3	4	5	6	7
7	I create the conditions for brainstorming the strategic issues and actions.	1	2	3	4	5	6	7
8	I build an action plan with time lines and assigned responsibilities to enable the community vision to be achieved.	1	2	3	4	5	6	7
9	I facilitate achieving buy-in to the action plans and next steps.	1	2	3	4	5	6	7
10	I follow up on action plans to ensure completion.	1	2	3	4	5	6	7
11	I seek innovative solutions for persistent problems encountered while mobilizing to achieve the vision.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

70 – 61 Excellent Score
60 – 41 Stronger Score

40 - 21 Opportunities for Growth
20 - 1 Important to Change Behavior

Adapted from *Collaborative Leadership: Fundamental Concepts Learning Module: Participant’s Guide*.

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Collaborative Leadership Practices

Building Trust

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Action Plan.

	Behaviors	BEHAVIOR FREQUENCY						
		Seldom		Sometimes		Often		Almost Always
1	I build communication processes that make it safe for people to say what is on their minds.	1	2	3	4	5	6	7
2	I refuse to engage in “rigged” processes.	1	2	3	4	5	6	7
3	I protect the group from those who would wield personal power over the collaborative process.	1	2	3	4	5	6	7
4	I create credible processes for collaborating.	1	2	3	4	5	6	7
5	I ensure that processes for exercising collaborative leadership are open to all stakeholders.	1	2	3	4	5	6	7
6	I ensure that the processes for collaborative leadership are transparent to all stakeholders.	1	2	3	4	5	6	7
7	During the first stage of creating collaborative relationships, I establish the common ground among the stakeholders.	1	2	3	4	5	6	7
8	I approach collaboration by relying heavily on building trust among stakeholders.	1	2	3	4	5	6	7
9	I “walk the talk”, i.e., I do what I say I will do.	1	2	3	4	5	6	7
10	I demonstrate to my peers that I believe that trust is the foundation for successful collaboration.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

70 – 61 Excellent Score 40 - 21 Opportunities for Growth
60 – 41 Stronger Score 20 - 1 Important to Change Behavior

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Collaborative Leadership Practices

Sharing Power and Influence

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Action Plan.

Behaviors		BEHAVIOR FREQUENCY						
		Seldom		Sometimes		Often		Almost Always
1	I use my personal power responsibly.	1	2	3	4	5	6	7
2	I share power as a means for increasing power.	1	2	3	4	5	6	7
3	I share power with others whenever possible.	1	2	3	4	5	6	7
4	I offer people an active role in decision making about matters that affect them.	1	2	3	4	5	6	7
5	When exercising leadership, I rely significantly on peer problem-solving.	1	2	3	4	5	6	7
6	I promote self-confidence in others.	1	2	3	4	5	6	7
7	I create processes that ensure stakeholders an equal say in decision making.	1	2	3	4	5	6	7
8	I encourage others to act together to change circumstances that affect them.	1	2	3	4	5	6	7
9	I express confidence in the capabilities of others.	1	2	3	4	5	6	7
10	I use influence to produce results whenever possible.	1	2	3	4	5	6	7
11	I am open to being influenced by others.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

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70 – 61 Excellent Score
60 – 41 Stronger Score

40 - 21 Opportunities for Growth
20 - 1 Important to Change Behavior

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Collaborative Leadership Practices

Developing People

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Action Plan.

Behaviors		BEHAVIOR FREQUENCY						
		Seldom		Sometimes		Often		Almost Always
1	I take seriously my responsibility for coaching and mentoring others.	1	2	3	4	5	6	7
2	I invest adequate amounts of time doing people development.	1	2	3	4	5	6	7
3	I define my role when serving as coach.	1	2	3	4	5	6	7
4	I am committed to developing people from diverse segments of the population.	1	2	3	4	5	6	7
5	I create opportunities for people to assess their leadership skills.	1	2	3	4	5	6	7
6	I help people take advantage of opportunities to learn new skills.	1	2	3	4	5	6	7
7	I look for ways to help others become more successful at their jobs.	1	2	3	4	5	6	7
8	I help people to take advantage of opportunities for new experiences.	1	2	3	4	5	6	7
9	I establish my expectations for the people I mentor.	1	2	3	4	5	6	7
10	I ask the people I mentor to define their expectations.	1	2	3	4	5	6	7
11	I create a mutually agreed-upon coaching plan, including criteria for success.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

70 – 61 Excellent Score
60 – 41 Stronger Score

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Collaborative Leadership Practices

Self-Reflection

Self-Assessment Exercise

For each item, circle one rating under the “Behavior Frequency” column, indicating your view of how often you exhibit that behavior. Your responses to this questionnaire are for your own use. You will not be asked to share your scores after you have answered. Use your scores and the information from this assessment to help develop your Collaboration Action Plan.

Behaviors		BEHAVIOR FREQUENCY						
		Seldom	2	Sometimes	4	Often	6	Almost Always
1	I recognize the effect of my emotions on work performance.	1	2	3	4	5	6	7
2	I recognize the effect of my emotions on relationships.	1	2	3	4	5	6	7
3	I recognize my personal impact on group dynamics.	1	2	3	4	5	6	7
4	I can describe my strengths realistically.	1	2	3	4	5	6	7
5	I can describe my weaknesses realistically.	1	2	3	4	5	6	7
6	I work to understand others’ perspectives.	1	2	3	4	5	6	7
7	I read the dynamics of groups.	1	2	3	4	5	6	7
8	I listen to others actively, checking to ensure my understanding.	1	2	3	4	5	6	7
9	I read non-verbal communication accurately.	1	2	3	4	5	6	7
10	I use self-assessment tools such as personality inventories to inform my self reflections.	1	2	3	4	5	6	7
11	I seek feedback from all relevant constituencies about my behavioral impact.	1	2	3	4	5	6	7

Your Score: Add all the circled behavior frequencies. Write the number in the box.

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70 – 61 Excellent Score
60 – 41 Stronger Score

40 - 21 Opportunities for Growth
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