# The OFA Project IMPROVE Leadership Initiative 

Project IMPROVE Team and OFA

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# The OFA Project IMPROVE Leadership Initiative <br> Session 1: Strategic and Visionary Leadership <br> Project IMPROVE Team and OFA 

October 17, 2022

## About Project IMPROVE

/ Sponsored by the Administration for Children and Families within the U.S. Department of Health and Human Services

- Office of Family Assistance (OFA)
/ Remarks from OFA

Vision
/ To build an evidence-driven leadership practice that advances careers and improves outcomes for staff and participants

## Why focus on leadership?

/ These past few years have taught us more than ever the importance of strong, proactive leadership and the power of community
/ We have learned that to be successful we need strong leadership and supervision practices to support it
/ Strong leaders build successful programs and play a key role in driving equity

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## Training series

| Date | Session | Date | Session |
| :---: | :--- | :--- | :--- |
| Oct. 17 | Strategic and Visionary Leadership | Nov. 14 | Developmental Supervision |
| Oct. 24 | Tools for Managing Change and <br> Continuous Improvement | Nov. 28 | Changing Culture and Practice |
| Oct. 31 | Operational Management- <br> Defining and Implementing Our <br> Program |  |  |
| Nov. 7 | Creating an Environment That <br> Supports and Advances Leaders of <br> Color |  |  |

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## What we hope to achieve today


/ Provide a clear understanding of leadership
/ Explore the benefits and building blocks of an evidence-informed leadership approach
/ Empower you to inspire and support transformative change in your program

## What Is Leadership?

## What does it mean to be a leader?

> "Achieving significant positive impact ... by building an organization of people working together toward a
> common goal." -Harvard Business Review

## Who is a leader?

## "Anyone who takes responsibility for finding potential in people and processes and who has the courage to develop that potential." - Author Brené Brown

## What are the core functions of leaders?

- Supportively guides professional development
- Goal-driven skills development

- Efficiently and effectively deploys processes, resources, and systems
- Actively manages performance


## How did we develop this practice?



Literature review on leadership, organizational change, and management practices


Input from human service and workforce leaders and
practitioners


Translating research to practice

| Strategic and visionary leadership |  |  |
| :---: | :---: | :---: |
| Articulates and embodies the vision | Envisions and defines possibilities | Articulates a vision that motivates and directs the services and the people |
|  | Mission and vision-driven | Promotes staff mindsets and behaviors that further the mission and vision |
| Defines and adapts the strategy | Goal-directed strategy | Consistently articulates concrete goals that promote collective aspiration to improve |
|  | Motivation | Evokes motivation among staff to propel quality service delivery |
|  | Diversity, equity, and inclusion | Promotes and empowers efforts to increase equity and inclusion |
| Proactive and responsive to the environment | Adaptive management | Adaptive, intentional approach to problem identification and solution generation |
|  | Self-reflective decision-making | Reflective about one's strengths and limitations; seeks input from others |
|  | Innovation | Balances bureaucracy and infrastructure with innovation, enabling iteration of new ideas |
|  | Psychological safety | Creates an environment where people feel safe to share ideas, ask questions, and admit mistakes |
| Operational management |  |  |
| Efficiently and effectively deploys processes, resources, and systems | Administration and operations | Efficiently equips staff to execute key strategies and operations in service of the mission and vision |
|  | Communication | Fosters an environment of consistent, transparent, multidirectional internal and external communication |
|  | Resource management | Efficiently builds and manages resources in service of mission, vision, and strategy |
| Actively manages performance | Quality assurance | Clearly articulates and consistently maintains expectations/quality standards |
|  | Quality improvement | Continuously streamlines and strengthens service delivery |
|  | Data analytics | Leverages data to meaningfully inform decision-making at all levels of the organization |
| Developmental supervision |  |  |
| Supportively guides professional development | Responsiveness | Authentically responsive and supportive toward staff regarding questions, changes, and needs |
|  | Reflective engagement | Regularly and frequently engages in individualized supervision to support development of staff potential |
|  | Exhibits a growth mindset | Converts mistakes or problems into opportunities for organizational and lifelong learning and growth |
|  | Strengths-based | Consistently empowers others to act based on their relative strengths |
|  | Belief in the ability to change | Sees the potential in supervisees and believes in their ability to achieve it |
| Goal-driven skills development | Promotes goal-directed behaviors | Coaches supervisees to pursue goals focused on growing core competencies and skills directly related to their roles and responsibilities |
|  | Meaningful, timely accountability | Holds staff accountable to their goals, job responsibilities, and essential quality standards |

## Transformational leadership practices

## Status quo in TANF programs

/ Science-informed practice
/ Focus on building core skills and competencies
/ Processes promote growth and meaningful change

- Staff performance based on skill and competency development
/ Promotes growth, learning, and progress towards goals

Transformational leadership
/ Often compliance-oriented
/ Focus tends to be federal work requirements
/ Processes can be reactive and/or transactional

- Staff performance may be based on adherence to federal and state requirements
/ Limited staff accountability


## Reflection questions for the breakout

/ What are your reactions to the definition of leadership? How would you define it?
/ What is the importance of casting a vision and creating clear strategies to execute the vision?
/ What investments has your agency made in your development?


## Strategic and visionary leadership



- Articulates and embodies the vision
- Defines and adapts the strategy
- Proactive and responsive to the environment


## Articulates and embodies the vision

## / Envisions and defines possibilities

- Articulates a vision that motivates and directs services and the people


## / Leads with mission and vision in mind

- Promotes staff mindsets and behaviors that further the mission and vision

> In our research for the HBR Leader's Handbook, we identified three critical vision-creation opportunities that you can grasp, even if you are not the CEO: contributing to senior leaders' vision work, translating the company's vision for your team, and developing a new frontline team vision that can be cascaded up through the company.

## Opportunities to cast vision

In your organization
or program


With those you supervise


In your team


For yourself


## Defines and adapts the strategy

## / Goal-directed strategy

- Consistently articulates concrete goals that promote collective aspiration to improve


## / Motivation

- Evokes motivation among staff to propel quality service delivery
/ Diversity, equity, and inclusion
- Promotes and empowers efforts to increase equity and inclusion

The Black Lives Matter and \#MeToo movements have forced people in positions of power-namely, the white men who dominate institutional leadership roles-to realize they must personally step up to make organizations more fair and inclusive. That means playing a truly active role in helping marginalized colleagues advance (instead of just delegating diversity efforts to human resources).

Authors Dr. Tsedale M. Melaku and Dr. Angie Beeman

## Proactively responds to the environment

## / Adaptive management

- Adaptive, intentional approach to problem identification and solution generation


## / Self-reflective decision making

- Reflective about one's strengths and limitations; seeks input from others


## / Innovation

- Balances bureaucracy and infrastructure with innovation, enabling iteration of new ideas
/ Psychological safety


## Practice

/ What would you really like to change based on what we talked about today?

- You might use the framework to inspire your thinking
/ Why is this important to you?



## Dive in

Most leadership trainings are about teaching ideas, sharing best practices, and increasing knowledge. But successful people rarely become better leaders because they know more. They become better leaders because they follow through on what they know. That followthrough requires emotional courage-willingness to feel the feelings that come when we take risks and break old patterns.

## The OFA Project IMPROVE Leadership Initiative <br> Session 2: Tools for Managing Change and Continuous Improvement

Project IMPROVE Team and OFA

## What we hope to achieve today

/ Talk about the challenges of planned and unplanned change for organizations and people
/ Explore how to manage it
/ Discuss tools and strategies for managing change and continuous improvement

## Managing Change

Everyone reacts differently to change
Everyone reacts differentlyto change



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## Unplanned change can feel like grief

## The Kübler-Ross change curve ${ }^{T M}$



## Change as an opportunity for growth



## Strategies and Tools for Managing Change and Continuous Improvement

## Adaptive and technical leadership framework

## / Adaptive leadership

- Builds on the principles of science (evolution)


## / Technical versus adaptive problems

Technical problems have known solutions that can be implemented with current knowledge and resolved through authoritative expertise the organization's current structures, procedures, and ways of doing things


Adaptive problems can only be addressed through changes in people's priorities, beliefs, habits, and loyalties; this requires mobilizing discovery, shedding certain entrenched ways, tolerating losses, and generating new capacity to thrive


[^1]
## Immunity to change process

| Commitments | Doing/not doing <br> instead | Collective, hidden, <br> competing <br> commitments |
| :--- | :--- | :--- | assumptions


| What do we | What prevents | What is the fear | We assume |
| :--- | :--- | :--- | :--- |
| want to | the | if we do | that $\ldots$ |
| change? | commitment | something other |  |

## Example \#1 (individual)

| Commitments | Doing/not doing instead | Collective, <br> hidden, competing <br> commitments | Big assumptions |
| :--- | :--- | :--- | :--- |
| I want to work no <br> more than 50 <br> hours per week | I respond to too many <br> internal requests not tied <br> to my work | Being a good soldier <br> Proving that I am of <br> value within my <br> organization | If I say "no," the world <br> will end |
|  | I accept all meetings <br> without questioning their <br> purpose | Not disappointing my <br> colleagues |  |
|  | I spend time and <br> emotional energy trying to <br> address things outside <br> my control |  |  |

## Example \#2 (team)

| Commitments | Doing/not doing <br> instead | Collective, <br> hidden, competing <br> commitments | Big assumptions |
| :--- | :--- | :--- | :--- |
| We want to have <br> meaningful rather <br> than transactional <br> relationships with <br> clients | We jprocess" people <br> performance based <br> on compliance to <br> timeliness and <br> paperwork | We fear that clients <br> will game the system | We fear clients don't <br> know what to do |
|  | We don't need to people |  |  |
|  | Weaders have don't prioritize <br> time for meaningful <br> transactional <br> relationships with <br> staff | staff development |  |

## Learn, Innovate, Improve (LI²)

Testing leads to continuous learning and further innovation


Test and refine until goals are met

## Reflection questions for the breakout

/ What has been your experience with managing changeboth planned and unplanned? How do these compare?
/ What strategies have you used for continuous improvement-that is, to reflect and course correct?
/ What strategies appear to work best for managing change (planned and unplanned) and continuous improvement?
/ What advice would you give your younger self on these issues?

## / Apply to your work

- Learn more about at least one of these strategies
- Try at least one of these strategies in your work
/ Adaptive and technical leadership
- Article
/ Immunity to change
- Practice resource
/ Learn, innovate, improve
- LI ${ }^{2}$ Practice Guide




# The OFA Project IMPROVE Leadership Initiative 

Session 3: Operational Management-Defining and Implementing Our Program

Project IMPROVE Team and OFA

## Mezzo's Memo

/ Vision: To be a companion guide that recaps and helps you act on training content

## / What's in it for you?

- Content reminders
- Multimedia resources
- Hyperlinked resources for taking action
- Platform to interact with each other
/ https://tinyurl.com/mezzomemo



## Objectives for today

/ Explore operational management as a core function of leadership
/ Learn about common challenges in operational management and examples of potential solutions

## What are the core functions of leaders?

- Supportively guides professional development
- Goal-driven skills development

- Articulates and embodies
- Defines and adapts the
- Proactive and responsive to the environment
- Efficiently and effectively deploys processes, resources, and systems
- Actively manages performance


## Efficiently and effectively deploys processes, resources, and systems

## / Administration and operations

- Efficiently equips staff to execute key strategies and operations in service of the mission and vision
/ Communication
- Fosters an environment of consistent, transparent, multidirectional internal and external communication
/ Resource management
- Efficiently builds and manages resources in service of the mission, vision, and strategy



## Actively manages performance

## / Quality assurance

- Clearly articulates and consistently maintains expectations and/or quality standards
/ Quality improvement
- Continuously streamlines and strengthens service delivery


## / Data analytics

- Leverages data to meaningfully inform decision making at all levels of the organization


## Is there a difference between leadership and management?

Management consists of controlling a group or a set of entities to accomplish a goal. Leadership refers to an individual's ability to influence, motivate, and enable others to contribute toward organizational success. Influence and inspiration separate leaders from managers, not power and control.

Author and Entrepreneur Vineet Nayar

Most of the long-running debate over leaders versus managers focuses on nouns when it should focus on verbs. Everyone needs both leading and managing in their work, and the best executives balance the two.

Author James R. Bailey

Common Challenges and
Solutions: Paperwork

## When paperwork smothers you ...



## When paperwork gets in the way ．．．

## 80＋forms <br> 80＋ <br>  



The team used．．．

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## Solution: Paperwork analysis

## Keep <br> Streamline

## Eliminate

## Solution: Change the look and feel of paperwork

| EARN PROGRAM ENROLLMENT PACKET Clear heading |  |  |
| :---: | :---: | :---: |
| Hello, and welcome to $<\begin{aligned} & \text { Bold colors } \\ & \text { Large text }\end{aligned}$ |  |  |
| We are looking forward to working with you. |  |  |
| Before EARN orientation begins, we'd like you to review the materials in this packet. This will give us a head start on serving you better. |  |  |
| Please take the next couple of minutes to review and complete the following forms. |  | Using white |
| Form 1: EARN mission and services | Review this form to learn why you are here and how we can help! |  |
| Form 2: EARN program policy acknowledgment | Review this form, then sign and date it to acknowledge your acceptance. | Provide clear directions |

## Final result：Fewer forms and greater visual <br> Final re appeal <br> 



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## Common Challenges and Solutions: Communication

## Problems

/ Too much information

- Can flood staff and make it difficult for them to prioritize
/ Information is unclear
/ Information isn't timely



## Solution: Use a decision tree for holding meetings



## Solution: Map out communication needs

| Step | Action | When | Date | Audience | Mode | Communicator |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Notify site administrator of upcoming change | $1.5+$ months in advance | MM.DD.YY | Center leaders | Email | Manager of integrated systems |
| 2 | Provide center leaders and relevant team leads with high-level overview of process changes <br> (Meeting \#1) | 1 month in advance | MM.DD.YY | Center leaders | Meeting/call | Manager of integrated systems, program rep |
| 3 | Provide a summary email to center leaders and relevant team leads; include relevant training materials | 1-2 days after Meeting \#1 | MM.DD.YY | Center leaders | Email | Program rep |

## Solution: Consider communication strategy



Audience: Who?
What are their needs?


Goal: What do we want them to know?
How do we want them to feel? What do we want them to do?

Feedlback: Can I test messages, ask for feedback?

Context: How long am I speaking or how long is this email? Can I collaborate with my audience?

Structure: What is it?
Why is it important?

# Common Challenges and Solutions: <br> Roles and Responsibilities 

## Problems

## / Duplication and overlap of responsibilities

- Staff may stray from their lane
- Staff may not follow through on something they are responsible for
/ Participants may feel confused about who to approach for what



## Solution: Map participant flow



## Solution: Map interactions between participants and staff

## Before redesign



After redesign


## Solution: Use swim lanes



## Reflection questions for the breakout

/ What resonated with you in the content we just shared?
/ What are the qualities and skills of a good operations manager?
/ Where do you see your primary strengths-as a good leader, good operations manager, or both?
/ Why is strong program management important? What are the consequences of poorly managed operations?
/ What strategies have you used to manage your program consistently well?
/ What operations strategies appear to work best? Where could you use more help?

## Practice

## / Apply to your work

- Learn more about at least one of these strategies
- Try at least one of these strategies in your work
- Learn more about at least one of these strategies
- Try at least one of these strategies in your work


## / Resources

- Streamlining paperwork


## The OFA Project IMPROVE Leadership Initiative

Session 4: Creating an Environment That Supports and Advances Leaders of Color

Project IMPROVE Team and OFA

## Objectives for today

/ Model how to support honest, difficult conversations about diversity, equity, and inclusion
/ Describe techniques for creating a safe, open environment
/ Explore possibilities to advance leaders of color in TANF programs

## Community and discussion norms

/ Show patience and respect one another's voice
/ Have an open mind
/ Be willing to share and speak your truth, and be open to asking questions
/ Understand this is a learning space
/ Welcome all styles of participation
/ Say it messy

## Community and discussion norms (cont.)

/ Focus on equity and inclusion
/ Be engaged, even when you are not talking (active listening)
/ Lead with curiosity
/ Honor differences and opinions
/ Be mindful of intention versus impact

## Discussion questions

/ What stood out to you or resonated most with you?
/ Where do you and your colleagues tend to get tripped up during these discussions? What can be done to ease those challenges?
/ What do you need to feel psychologically and emotionally safe? What can you do as a leader to create that space for others?
/ What is one thing that you can take away from today's session? What can you do differently in your program?

# The OFA Project IMPROVE Leadership Initiative <br> Session 5: Developmental Supervision 

Project IMPROVE Team and OFA

## What we hope to achieve today

/ Inspire leaders to invest in professional development for themselves and those they lead
/ Explore the importance of developmental supervision
/ Cultivate the conditions and practices that support professional development and growth

Motivation for Change: Why Develop Staff? <br> \section*{Benefits of developing yourself <br> \section*{Benefits of developing yourself <br> ＂Put your mask on first！＂ <br>  <br> 都 <br> ＂Put your mask o}




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## Benefits of developing your staff



Improves productivity


Increases job satisfaction


Reduces turnover


Helps staff realize their potential

## Benefits of developing your teams



Staff learn from each other


Better processes and products


Staff feel valued and connected

## Developing yourself and others is an investment



Time


ROO $=$ Growth

Emotional energy


# Challenges with Supervision Practices 



## Whack-a-mole supervision

/ Reacting to the ever-present crisis


- It seems each hour offers a new fire to put out
- Your job centers on constant fixing
/ Downsides
- Burns you out
- Is not fun
- Promotes dependency
- Takes time from mentoring and staff development


## Compliance-driven supervision

## / Overemphasis on WPR and key metrics

- Accountability = Meeting federal and state measures
- Focus on whether staff are hitting their targets
/ Downsides
- Many of these measures are outside of staff's control
- Staff focus on toeing the line with you
- Opportunities for motivational accountability are overlooked
/ Staff burn out


## Operations-only supervision

## / Near-exclusive focus on executing the process



- Every problem or question has a known, technical solution
- The status quo is comfortable and predictable


## / Downsides

- Leadership = Being a veteran operator
- Forsakes innovation and resists change
- Misses growth opportunities and overlooks adaptive challenges


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A Different Supervision

## What does it mean to be a leader?

> "Achieving significant positive impact ... by building an organization of people working together toward a common goal."

## Who is a leader?

## Leadership core functions



## Striving toward a supervision practice that...

/ Puts personal motivation at the center of staff growth and performance

- Rather than compliance
/ Focuses on building core skills and competencies
- Rather than fixing problems
/ Uses a systematic process to promote professional growth and learning
- Rather than relegating growth conversations to performance appraisals


## Supervisory functions and competencies

/ Supportively guides professional development

- Responsiveness
- Reflective engagement
- Exhibits a growth mindset
- Strengths-based

- Belief in the ability to change
/ Promotes goal-driven skills development
- Promotes goal-directed behaviors
- Provides meaningful, timely accountability




## Supportively guides professional development

## / Responsive

- Authentically responsive and supportive toward staff regarding questions, changes, and needs


## / Reflective

- Regularly and frequently engages in individualized supervision to cultivate development of a staff member's potential


## / Growth mindset

- Converts mistakes or problems into opportunities for organizational learning and personal growth


## Supportively guides professional development (cont.)

/ Strengths-based

- Consistently empowers staff to act based on their relative strengths
/ Belief in ability to change
- Sees the potential in staff and believes in their ability to achieve it <br> $(2)$ <br> \section*{\section*{Goal－driven skills development <br> \section*{\section*{Goal－driven skills development <br> <br> <br> － <br> <br> <br> － <br> <br> G} <br> <br> G}


## ／Promotes goal－directed behaviors

－Coaches staff to pursue goals focused on growing core competencies and skills directly related to their roles and
／Provides meaningful，timely accountability
－Holds staff accountable to their goals，job responsibilities， and essential quality standards and essential quality standards

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## responsibilities




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quality standards


## Discussion questions

/ What stood out to you or resonated most with you?
/ Which supervision challenges could you relate to? Why?
/ What would you like to change about your supervisory practice? What would you need to make those changes?
/ How might you apply the competencies and practices for good supervision?
/ What is one thing that you can take away from today's session? What can you do differently in your program?

## Mezzo's Memo

/ Vision: To be a companion guide that recaps and helps you act on training content

## / What's in it for you?

- Content reminders
- Multimedia resources
- Hyperlinked resources for taking action
- Platform to interact with each other
/ https://tinyurl.com/mezzomemo



## The power of investing in your people

The most powerfully motivating condition people experience at work is making progress at something that is personally meaningful. If your job involves leading others, the implications are clear: the most important thing you can do each day is to help your team members experience progress at meaningful work.

# The OFA Project IMPROVE Leadership Initiative <br> Session 6: Changing Culture and Practice 

Project IMPROVE Team and OFA

## What we hope to achieve today

/ Ground ourselves in the current realities in TANF and Tribal TANF programs
/ Share how a leadership practice might transform an agency's culture and practice
/ Explore next steps for applying what you've learned in this leadership initiative

## Current realities for leaders

/ New pressure to reengage participants to meet state work requirements
/ Leaders, direct service staff, and participants are navigating a changing labor market
/ Most programs have seen staff turnover or burnout or both
/ Some programs are experiencing increases in TANF caseloads
/ Continually leading change-both planned and unplanned


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## Opportunities for impact

/ These past few years have taught us more than ever the importance of strong, proactive leadership and the power of community
/ We have learned that to be successful we need strong leadership and supervision practices to support it
/ Strong leaders build successful programs and play a key role in driving equity
/ How can we take small steps to change program culture and organizational practices through strong leadership?


## Revisit core functions and competencies of leadership

- Supportively guides professional development
- Goal-driven skills development

- Articulates and embodies the vision
- Defines and adapts the strategy
- Proactive and responsive to the environment
- Efficiently and effectively deploys processes, resources, and systems
- Actively manages performance


## Draw on the science of behavioral change

/ Motivation

/ Capabilities
/ Opportunities


## Think holistically



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## Think

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| Strategic and visionary leadership |  |  |
| :---: | :---: | :---: |
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|  | Mission and vision-driven | Promotes staff mindsets and behaviors that further the mission and vision |
| Defines and adapts the strategy | Goal-directed strategy | Consistently articulates concrete goals that promote collective aspiration to improve |
|  | Motivation | Evokes motivation among staff to propel quality service delivery |
|  | Diversity, equity, and inclusion | Promotes and empowers efforts to increase equity and inclusion |
| Proactive and responsive to the environment | Adaptive management | Adaptive, intentional approach to problem identification and solution generation |
|  | Self-reflective decision-making | Reflective about one's strengths and limitations; seeks input from others |
|  | Innovation | Balances bureaucracy and infrastructure with innovation, enabling iteration of new ideas |
|  | Psychological safety | Creates an environment where people feel safe to share ideas, ask questions, and admit mistakes |
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| Goal-driven skills develop\|ment | Promotes goal-directed behaviors | Coaches supervisees to pursue goals focused on growing core competencies and skills directly related to their roles and responsibilities |
|  | Meaningful, timely accountability | Holds staff accountable to their goals, job responsibilities, and essential quality standards |

## Build on lessons from the pandemic



Use technology


Adapt to the changing labor market

Advance diversity, equity, and inclusion

## Look for adjacencies <br> 




## Embrace change

Process for organizational change and continuous improvement


Process for individual change

## Strive for impact


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## Discussion questions

/ What stood out to you or resonated most with you today?
/ What is one area of program culture or organizational practice that you would like to change?
/ How might a strong leadership practice-think core functions and competencies-support your change efforts?

- What other resources or supports might you need?
/ Round-robin: Share one reflection or takeaway from the training series that has inspired you to do something differently


## Mezzo’s Memo

/ Vision: To be a companion guide that recaps and helps you act on training content

## / What's in it for you?

- Content reminders
- Multimedia resources
- Hyperlinked resources for taking action
- Platform to interact with each other
/ https://tinyurl.com/mezzomemo



## Go forth!

It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither know victory nor defeat.


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[^1]:    Source: The Practice of Adaptive Leadership

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