

# LEADERSHIP DEVELOPMENT GUIDEBOOK

FOR TEENAGE YOUTH

**LEARNING FOR LIFE™**

UPLIFTING STUDENTS · BUILDING CHARACTER · DEFINING LEADERSHIP





*Real-World Career Experiences*  
**Exploring**®

# Leadership Development Guidebook for Teenage Youth



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# OVERVIEW

The Leadership Development Workshop Series is for Learning for Life senior high school groups, work-based Explorer posts, and any other programs serving teenage youth. The Leadership Development Workshop Series lesson plans provide high school students with exposure to life skills, personal management skills, and group leadership skills. Students learn to apply these skills in real-life leadership situations.

The Workshop Series can be offered as a one-day session, an overnight meeting, or as a multiday series of eight one-hour sessions during or after school.

## Instructional Objectives

Students will gain skills in the following areas:

1. **Personal Skills:** Learn to relate personal leadership skills to real-life situations.
2. **Group Skills:** Learn to relate group leadership skills to real-life situations.
3. **Cultural Diversity:** Gain confidence in the ability to lead a culturally diverse group and to manage changing situations within the group.
4. **Character Attributes:** Learn how basic character education relates to the development of leadership beliefs, values, and skills.
5. **Planning:** Identify specific steps that will strengthen leadership abilities in the planning of various tasks, events, or activities.

## List of Leadership Development Workshop Lesson Plans

Students must complete eight workshops to receive the Leadership Development Workshop Series Recognition Certificate. See recognition information on page 8.

Introduction to Leadership (Required)

Personal Skills (Complete two of five.)

- Time Management
- Meeting Management

- Communication
- Decision Making
- Goal Setting

Group Skills (Complete two of five.)

- Team Building
- Effective Group Management
- Motivation
- Managing Through Others
- Analysis/Evaluation

Cultural Diversity (Complete one of two.)

- Beliefs and Values
- Diversity, Culture, and Climate

Character Attributes (Complete one of two.)

- Character of Leadership
- Ethics of Leadership

Planning (Required)

- Planning—Sequence of Events

## Sample Schedules for Workshops

On the following pages are sample schedules for a one-day workshop, an overnight workshop, and a multiday workshop for high school groups.

The italicized items in each schedule are individual workshop sessions. Each of these sessions has a lesson plan included in this guidebook. Note that each session is scheduled for one hour. All sessions, except for *Introduction to Leadership* and *Sequence of Events*, must be given twice. You may be able to eliminate a session by pre-registering the participants. However, remember that to earn the certificate, each student must take eight different sessions.

# ONE-DAY WORKSHOP

## Sample Schedule

### OVERVIEW

8 A.M.	Registration and Icebreakers
8:30 A.M.–9:30 A.M.	<i>Introduction to Leadership</i> (All students participate.)
9:30 A.M.–10:30 A.M.	Personal Skills—Session 1 (Student selects one of five topics.) <i>Time Management</i> <i>Meeting Management</i> <i>Communication</i> <i>Decision Making</i> <i>Goal Setting</i>
10:30 A.M.–10:45 A.M.	Break
10:45 A.M.–11:45 A.M.	Personal Skills—Session 2 (Student selects one of five topics.) <i>Time Management</i> <i>Meeting Management</i> <i>Communication</i> <i>Decision Making</i> <i>Goal Setting</i>
11:45 A.M.	Lunch Motivational speaker
12:30 P.M.–1:30 P.M.	Group Skills—Session 1 (Student selects one of five topics.) <i>Team Building</i> <i>Effective Group Management</i> <i>Managing Through Others</i> <i>Motivation</i> <i>Analysis/Evaluation</i>
1:30 P.M.–2:30 P.M.	Group Skills—Session 2 (Student selects one of five topics.) <i>Team Building</i> <i>Effective Group Management</i> <i>Managing Through Others</i> <i>Motivation</i> <i>Analysis/Evaluation</i>
2:30 P.M.–3:30 P.M.	Cultural Diversity (Student selects one of two topics.) <i>Diversity, Culture, and Climate</i> <i>Beliefs and Values</i>
3:30 P.M.	Break/Snacks



# ONE-DAY WORKSHOP (CONTINUED)

## Sample Schedule

4 P.M.–5 P.M.	Character Attributes (Student selects one of two topics.) <i>Character of Leadership</i> <i>Ethics of Leadership</i>
5 P.M.–6 P.M.	<i>Planning—Sequence of Events</i> (All students participate.)
6 P.M.	Presentation of Certificates Closing Adjournment

# OVERNIGHT WORKSHOP

## Sample Schedule

### OVERVIEW

First Day

7 P.M.

Registration and Icebreakers

7:30 P.M.–8:30 P.M.

*Introduction to Leadership* (All students participate.)

8:30 P.M.–9:30 P.M.

Personal Skills—Session 1  
(Student selects one of five topics.)

*Time Management*

*Meeting Management*

*Communication*

*Decision Making*

*Goal Setting*

9:30 P.M.

Snacks

11 P.M.

Lights Out

Second Day

8 A.M.

Breakfast

9 A.M.–10 A.M.

Personal Skills—Session 2  
(Student selects one of five topics.)

*Time Management*

*Meeting Management*

*Communication*

*Decision Making*

*Goal Setting*

10 A.M.–10:15 A.M.

Break

10:15 A.M.–11:15 A.M.

Group Skills—Session 1  
(Student selects one of five topics.)

*Team Building*

*Effective Group Management*

*Managing Through Others*

*Motivation*

*Analysis/Evaluation*

11:15 A.M.–12:15 P.M.

Group Skills—Session 2  
(Student selects one of five topics.)

*Team Building*

*Effective Group Management*

*Managing Through Others*

*Motivation*

*Analysis/Evaluation*

# OVERNIGHT WORKSHOP (CONTINUED)

## Sample Schedule

12:15 P.M.	Lunch Motivational Speaker
1:30 P.M.–2:30 P.M.	Cultural Diversity (Student selects one of two topics.) <i>Diversity, Culture, and Climate</i> <i>Beliefs and Values</i>
2:30 P.M.–3:30 P.M.	Character Attributes (Student selects one of two topics.) <i>Character of Leadership</i> <i>Ethics of Leadership</i>
3:30 P.M.–4:30 P.M.	<i>Planning—Sequence of Events</i> (All students participate.)
4:30 P.M.	Presentation of Certificates Closing Adjournment

# MULTIDAY WORKSHOP

## Sample Schedule

Day 1—*Introduction to Leadership* (All students participate.)

Day 2—*Personal Skills—Session 1*  
(Student selects one of five topics.)

*Time Management*  
*Meeting Management*  
*Communication*  
*Decision Making*  
*Goal Setting*

Day 3—*Personal Skills—Session 2*  
(Student selects one of five topics.)

*Time Management*  
*Meeting Management*  
*Communication*  
*Decision Making*  
*Goal Setting*

Day 4—*Group Skills—Session 1*  
(Student selects one of five topics.)

*Team Building*  
*Effective Group Management*  
*Managing Through Others*  
*Motivation*  
*Analysis/Evaluation*

Day 5—*Group Skills—Session 2*  
(Student selects one of five topics.)

*Team Building*  
*Effective Group Management*  
*Managing Through Others*  
*Motivation*  
*Analysis/Evaluation*

Day 6—*Cultural Diversity*  
(Student selects one of two topics.)  
*Diversity, Culture, and Climate*  
*Beliefs and Values*

Day 7—*Character Attributes*  
(Student selects one of two topics.)  
*Character of Leadership*  
*Ethics of Leadership*

Day 8—*Planning—Sequence of Events* (All students participate.)  
Presentation of Certificates  
Closing  
Adjournment

## Budgeting

A budget will need to be developed and approved by the Learning for Life office prior to involving local high schools, Explorer posts, and other organizations serving youth. The budget should also be developed before the publicity mailing. It should include:

### Expenses:

Mailings	\$ _____
Handout reproduction	\$ _____
Overhead reproduction	\$ _____
Food _____ x \$ _____ =	\$ _____
Recognition for instructors	\$ _____
Site rental fees	\$ _____
A/V rentals	\$ _____
Insurance	\$ _____
Notebook	
_____ x \$ _____ =	\$ _____
T-shirts/patches, etc.	
_____ x \$ _____ =	\$ _____
Learning for Life office fees	\$ _____
Contingency (10%)	\$ _____
Total expenses	\$ _____

### Income:

Participant fees	
_____ x \$ _____ =	\$ _____
Gifts in kind	\$ _____
Donations	\$ _____
Total income	\$ _____

## Site Selection

This workshop series requires the use of a facility that has the following characteristics:

- Room large enough to hold meetings of the entire group
- Breakout rooms for five simultaneous topics
- Place to feed the participants
- Overnight housing if overnight program is selected (separate facilities for males, females, adults, and youth)
- Restrooms, kitchen facilities, etc.
- Sufficient parking for participants and their adult Advisors/teachers
- Location that is easy for participants to find

## Workshop Instructors

Instructors for this course can be obtained from various sources, such as:

- Learning for Life group teachers
- Explorer post Advisors
- Learning for Life executive board members
- Local business community
- Organizations such as Toastmasters International

- Local service clubs (Rotary, Kiwanis, Lions, Civitan, etc.)
- Local government agencies

Instructors should be provided with the lesson plan for the session they will be presenting or moderating. Be sure you remind them how important it is to get the students involved in the discussions.

## Motivational Speaker

Choose a speaker for the lunch session who can motivate the students. Among the possibilities are local celebrities, youth leaders, local athletes, or Olympians. Remember that whoever is chosen as speaker should be able to relate to the youth in your community.

## Training Aids and Equipment Required

- Flip chart pad and markers, chalk board and chalk, or white board and markers
- Masking tape
- Overhead projector
- Handouts reproduced from each lesson plan for each student
- Overhead transparencies reproduced from each lesson plan for instructor

## Publicizing the Workshops

Enclosed in this guidebook is a sample announcement for the workshops (see page 9) along with a sample participant registration form (see page 10). This material should be mailed to potential participants prior to the workshop. The mailing should be followed up by personal contact to ensure participation.

## Recognition

Each student may earn recognition for completion of the Leadership Development Workshop Series program by completing the following requirements:

- Complete the Introduction to Leadership session.
- Complete two of the five topics in the Personal Skills unit.

- Complete two of the five topics in the Group Skills unit.
- Complete one topic of the Cultural Diversity unit.
- Complete one topic of the Character Attributes unit.
- Complete the Planning session.

Recognition is the Leadership Development Workshop Series Recognition Certificate. The certificate can be reproduced from this book (see page 12).

## Backdating

To be successful, your team will need to accomplish the following (-10 means 10 days prior to the workshop):

Item	When
Recruit workshop chairperson	-180 days Professional staff/LFL Program Committee
Select site	-150 days Workshop chairperson
Develop and approve budget	-150 days Workshop chairperson/professional staff
Recruit instructors	-120 days Workshop chairperson/professional staff
Mail announcement/registration materials to posts and groups	-120 days Professional staff
Reproduce handouts/overheads	-60 days Professional staff
Preliminary participant count	-30 days Workshop chairperson
Order food service	-30 days Professional staff
Final counts	-15 days
Hold workshop	0 days Everyone
Mail thank-yous	+5 days Workshop chairperson



## Sample Leadership Development Workshop Series Announcement

The Leadership Development Workshop Series is a skills course specifically designed to provide high school students with a chance to develop leadership skills in a daylong, hands-on workshop.

Included will be sessions in both personal and group skills.

### Introduction to Leadership

#### Personal Skills

- Time Management
- Meeting Management
- Communication
- Decision Making
- Goal Setting

#### Cultural Diversity

- Diversity, Culture, and Climate
- Beliefs and Values

#### Group Skills

- Team Building
- Effective Group Management
- Managing Through Others
- Motivation
- Analysis/Evaluation

#### Character Attributes

- Character of Leadership
- Ethics of Leadership

#### Planning

- Planning—Sequence of Events

The workshop particulars are:

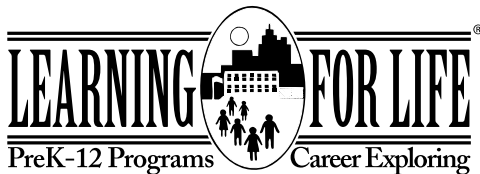
(Location)

(date)

8 A.M.–6:30 P.M.

The cost per participant will be \$ \_\_\_\_\_, which includes all workshop materials, lunch, and snacks during the day.

Please return the attached registration form to (\_\_\_\_\_ council office) by (\_\_\_\_\_ date). We expect this workshop to fill up early, so be sure your registration is on time.



## Leadership Development Workshop Series Sample Registration Form

Name of Organization \_\_\_\_\_

Learning for Life Group Number \_\_\_\_\_ or Explorer Post Number \_\_\_\_\_ (if applicable)

Contact Person: Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Telephone (Work) \_\_\_\_\_ (Home) \_\_\_\_\_

Enclosed is our check for \_\_\_\_ participants (adult and youth) at \$ \_\_\_\_ each.

Please indicate participants' names and their workshop preferences:

**OVERVIEW**

Participants' Names	Youth/Adult	Time Management	Meeting Management	Communication	Decision Making	Goal Setting	Team Building	Group Management	Managing Through Others	Motivation	Analysis/Evaluation	Diversity, Culture, and Climate	Beliefs and Values	Character Leadership	Ethics of Leadership

Please return by (date) to (Learning for Life office name and address).



# Icebreakers

## THE ALPHABET GAME

Give each person a letter on a sticky note and ask them to place it somewhere on the front of their body. You might want to give more vowels than consonants, and no x's, z's, or q's. Also, make the vowels a different color from the consonants.

Allow five minutes for them to form one word with at least three other letters/people (a minimum of four letters/people per word).

At the end of five minutes, take a look at all or some of the words formed, depending on the time you have.

Give each word-group a sheet of flip chart paper and ask them to form a sentence using that word to describe their expectations of the course.

## PROBLEM SOLVER

Start with all participants standing in a circle. Have four to 10 objects tucked into your pockets. Begin with one object; toss it to one person, asking the person to say his name, and then toss it to someone who has not yet received it. After everyone in the group has received it, ask that it be tossed back to you.

Now explain that this is a \_\_\_\_\_ test (memory, IQ, training—whatever fits your program or provides comic relief). Tell them that you will toss an object again and that they should toss it to the same person as before, but that this go-round will be timed.

Start timing as you toss the first object. Continue pulling objects out of your pockets, throwing them to the same person. End the timing when the last object has been returned to you. Announce the time as the “benchmark.” Then explain that competition in their industry is getting fierce, and they are going to have to figure out a way to cut the time in half (or let them choose a goal). Let them make repeated trials as they try to meet the goal. Observe the process the group uses to find a solution.

The size of the group is not a major factor in meeting the goal, nor is the number of objects. It is amazing to watch groups struggle with this seemingly simple

exercise as they whittle their time from one or two minutes to several seconds.

**Hint:** The participants move to touch the objectives instead of the objectives being tossed to them.

## COMMUNICATION EXERCISE

Blindfold several students. Be sure they are in an area where they cannot bump into anything dangerous. Then tell them to line up in order of their birth dates SILENTLY. Afterward, ask them how it felt to try to solve this problem without being able to talk.

Sometimes the biggest hurdle to learning for some students is admitting they NEED to learn something. This is a great, and safe, way for them to experience “hindered communication,” similar to what might happen to people whose first language is not English or to people new to their group or school.

This exercise can launch some good discussions about barriers to communication and how to overcome them.

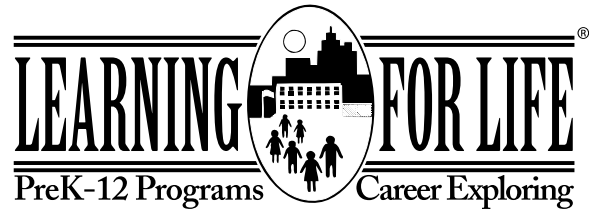
## WHAT DOES PENNY LOOK LIKE?

(From Edward E. Scannell and John W. Newstrom. 1991. *Still More Games Trainers Play*. N.p.: McGraw-Hill Trade, pg. 293.)

Introduce this exercise by asking: “How many times have you worked with people for so long that you actually don’t notice the gradual changes in their appearances? Did you ever know someone named Penny? If so, do you remember exactly what she looked like?” (This gets people to start picturing a person instead of the coin.)

Next, give each group a piece of paper and have them draw the front and the back of the penny coin. Remind them that it is against the rules to use the coin: This must be done strictly from memory. Allow five minutes. Ask if any group thinks they captured every single detail of the coin. Then give each group a real penny for comparison.

Conclusion: If we take a penny—something we see all the time—for granted and forget its details, then what happens with our own policies and procedures within the organization? What do we forget to tell new co-workers?



is recognized  
for participation  
in the  
**Leadership Development  
Workshop Series**

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Instructor

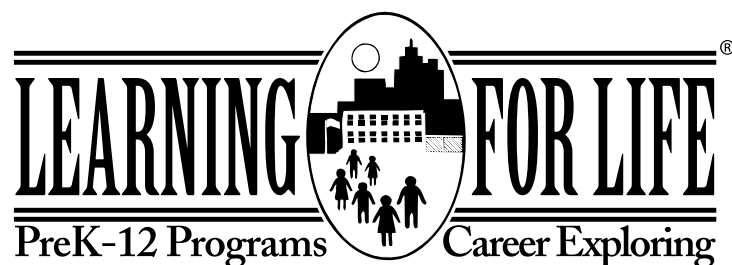
Date

# LEADERSHIP DEVELOPMENT WORKSHOP SERIES LESSON PLANS

The following pages contain lesson plans for each workshop. At the end of each lesson plan are the handouts and overheads for that session. Remember that each session should last no longer than 50 to 55 minutes.

A reference section can be found on page 235 that offers a list of books to support each workshop.

Also in this guidebook are typical icebreakers to be used during registration as the participants arrive (see page 11).





# WORKSHOP LESSON PLAN

## INTRODUCTION TO LEADERSHIP

### Description

This is the introductory session to the Leadership Development Workshop. All participants should attend this workshop.

### Learning Objectives

After completing this session, the student should have:

- Knowledge of basic analysis/evaluation principles
- Knowledge of the place for analysis and evaluation in leadership
- Exposure to various successful analysis and evaluation techniques

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Seven overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of five handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Background

**“Good leaders are made, not born. If you have the desire and willpower, you can become an effective leader.”**

—William Clark

Good leaders develop as they practice, take training, and gain experience.

**What is leadership?** Ask the students what they think leadership is and write their responses on a flip chart or blackboard. Post the chart for the rest of the session.

**What is management?** Ask the students what they think management is and write down their responses on a flip chart or blackboard. Post the chart for the rest of the session.

(Display the “What Is Leadership?” overhead from Handouts/Overheads at the end of this lesson plan.)

Let’s see if we can define leadership.

Leadership is the process by which a person unifies a group and influences its members to achieve a particular task or objective.

A person does this using leadership attributes (belief, values, ethics, character, knowledge, and skills).

Although your title as club president, team captain, or committee chairperson gives you certain authority in your group, the title alone does not make you a leader. It simply puts you in charge. Mere title holders are satisfied simply to TELL people to do something; true leaders, on the other hand, are able to MOTIVATE people to do their best to reach goals and objectives.

## How People Become Leaders

(Display the Warren Bennis quote overhead from Handouts/Overheads at the end of this lesson plan.)

**“Managers are people who do things right, while leaders are people who do the right thing.”**

—Warren Bennis, Ph.D., *On Becoming a Leader*

Bernard Bass’ theories of leadership state that there are three basic ways to explain how people become leaders.

## Leadership Theories

The first two ways explain how only a small number of people become leaders. The third explains how most become leaders.

These ways are:

(Display the “Leadership Theories” overhead from Handouts/Overheads at the end of this lesson plan.)

- Some people have personalities that may lead them naturally into leadership roles. This is the *trait theory*.
- A crisis or important event may bring out extraordinary leadership qualities in an ordinary person. This is the *great events theory*.
- People can choose to become leaders by learning leadership skills and changing (or transforming) their lives. This is the *transformational leadership theory*. It is the most widely accepted theory today.

When people are deciding if they respect you as a leader, they do not make an abstract list of your good and bad qualities. They watch what you do so they can know who you really are. They use their eyes and ears to tell if you are honorable and can be trusted or, instead, if you are a self-serving person who misuses your authority to make yourself look good.

The basis of good leadership is honorable character and selfless service to your organization. Another way of saying it is that leadership is everything you do that results in achieving your organization’s goals while contributing to the members’ sense of well-being. Good leaders always concentrate on three things: (1) **be**: what they are (beliefs and character), (2) **know**: what they know (job, tasks, human nature) and (3) **do**: what they do (implement, motivate, provide direction).

## Reasons for Being a Leader

Ask the students, “What makes a person want to follow a leader?” Write their answers on a flip chart or chalkboard.

People want leaders they can respect and who know what they are doing. To gain respect, leaders must be fair, and they must show that they have a strong vision of the future.

One study that examined more than 75 factors related to people's job satisfaction found that trust and confidence in leadership predicted satisfaction best.

## Effective Communication

Tell students: As a group leader, concentrate on three critical areas of communication to help you win the trust and confidence of group members:

- Help people understand the group's overall goals and strategies.
- Help members understand how they contribute to achieving group goals.
- Let group members know how the group is doing in moving toward achieving its goals.

So basically, you must be trustworthy and able to convince people that you have a good plan for the group's future.

## Leadership Principles

Notice how the Principles of Leadership closely tie in with this.

To help you be, know, and do, follow these 11 principles of leadership.

(Display the "Eleven Principles of Leadership" overhead and distribute it as a handout from Handouts/Overheads at the end of this lesson plan.)

- **Know yourself and seek self-improvement.** Know your strengths and weaknesses. Strengthen yourself through classwork, outside reading or study, and other activities.
- **Be good at doing your job.** Know your own job and duties, but also have a solid familiarity with the jobs and duties of those under you.
- **Seek responsibility and take responsibility for your actions.** Search for ways to guide your organization to new heights. When things go wrong, do not blame others. Analyze the situation, take corrective action, and move on to the next challenge.
- **Make good, timely decisions.** Use good problem-solving, decision-making, and planning tools.
- **Set the example.** Be a good role model for others. Don't just tell people what to do; show them by doing it yourself.

- **Know and care about people.** By your actions, show the members of your group that you sincerely care about them as people.
- **Keep the group informed.** Communicate effectively with all group members.
- **Promote a sense of responsibility.** Help group members develop good character traits that will help them carry out their responsibilities.
- **Make sure things get done.** Be certain that people understand their assigned tasks. Supervise their work, as needed, until it is completed. Communication is the key to this responsibility.
- **Train people as a team.** Although many "leaders" talk about "their team," they do little to promote a true team spirit. Create a true team spirit in your group.
- **Use the full capabilities of your group.** By developing a team spirit, you can help your group reach its highest potential.

## Factors of Leadership

(Display the "Factors of Leadership" overhead and distribute it as a handout from Handouts/Overheads at the end of this lesson plan.)

Four major factors help determine the effectiveness of leadership.

**Followers.** Different people require different styles of leadership. For example, a new member of your group requires more help than someone who's been a member for a long time. A person with a bad attitude requires a different approach from one who's enthusiastic and highly motivated. The first step is to understand the needs, emotions, and motivations of your members.

**Leader.** You must have an honest understanding of your capabilities—who you are, what you know, and what you can do. However, note that the followers, not the leader, determine if a leader is successful. To be successful you have to convince your followers, not yourself or your superiors, that you are worthy of being followed.

**Communication.** Build trust in yourself among your followers through your words and actions. Much of what they "hear" from you will be non-verbal communication. For instance, when you set the example, this communicates that you would not ask members to do anything that you would not be

willing to do. What you communicate and how you communicate it either builds or harms the relationship between you and those you are trying to lead.

**Situation.** All situations are different. What you do in one leadership situation will not always work in another situation. You must use your judgment to decide the best course of action and the leadership style needed for each situation. For example, you may need to confront someone for inappropriate behavior, but if the confrontation is too late or too early, too harsh or too weak, the results may prove ineffective.

### Attributes of Leaders

Other things also affect your potential effectiveness as a leader of a group or organization. For example: What are your relationships with other people within and outside the organization? What are the skills and abilities of group members? Who are the “hard workers”? And how is your group organized?

To be a good leader, you need people to trust you. To earn that trust, there are things that you must **BE**, **KNOW**, and **DO**.

(Display the “Attributes of Good Leaders” overhead and distribute it as a handout from Handouts/Overheads at the end of this lesson plan.)

**BE a professional.** Be loyal to the organization, perform selfless service, and take personal responsibility.

**BE someone with good character traits.** Seek to show honesty, competence, candor, commitment, integrity, courage, straightforwardness, and imagination.

**KNOW the four factors of leadership.** The factors include followers, leader, communication, and situation.

**KNOW yourself.** Know the strengths and weakness of your character; know your knowledge and skills.

**KNOW human nature.** Be aware of human needs and emotions and how people respond to stress.

**KNOW your job.** Be proficient and be able to train others in their tasks.

**KNOW your organization.** Where can you go for help? What are its values and background? Who are the unofficial leaders?

**DO provide direction.** Encourage group members to participate in goal setting, problem solving, decision making, and planning.

**DO implement.** See that a job gets done by using your skills to communicate, coordinate, supervise, and evaluate.

**DO motivate.** Help develop group morale and a team spirit in the organization: train, coach, and counsel members.

### Environment

Each group’s reaction to problems and opportunities is in many ways influenced by its heritage—something created in part by its past and present leaders. Leaders exert influence on the group’s environment by three types of actions:

- The goals and performance standards they establish
- The values they establish for the organization
- The business and people concepts they establish

### Leadership Models

Leadership models sometimes can help us understand why leaders act as they do by pointing to the most important factors. One such model, known as the “Managerial Grid,” is useful for us to look at. It considers just two factors (1) concern for people and (2) concern for task. Leaders are scored from 1 to 9 on each factor and grouped into four different types:

People	High—9	High People; Low Task (Cheerleader)	High People; High Task (Team Leader)
	1—Low	Low People; Low Task (Ghost Leader)	Low People; High Task (Taskmaster)
		1—Low	High—9
		Task	

Adapted from Blake and Mouton’s Managerial Grid (1985)

Most people would fall somewhere near the middle of the two axes. But, by looking at the extremes (people who score on the far end of the scales), we come up with four types of leaders.

(Display the “Types of Leaders” overhead and distribute it as a handout from Handouts/Overheads at the end of this lesson plan.)



**Taskmaster (high task; low people).** People who get this rating are very much task-oriented and have little consideration for those working with them. They do not seek cooperation or collaboration. Taskmasters are very big on schedules and expect people to do what they are told without question or debate. They are intolerant of suggestions for change, which they often see as criticism (rather than someone's creativity). People working under them find it difficult to contribute or to develop their talents. When something goes wrong, taskmasters tend to focus on assigning blame rather than finding out what went wrong and trying to prevent it from happening again.

**Team Leader (high task; high people).** By contrast, this type of leader leads by positive example. He or she endeavors to foster a team spirit in which all group members can reach their highest potential, both as team members and as people. The team leader encourages the group to reach group goals as effectively as possible, while also working tirelessly to strengthen the bonds among the various members. Team leaders form and lead the most productive teams.

**Cheerleader (low task; high people).** This leader uses mainly rewards to encourage the team to accomplish its goals and to maintain discipline. The cheerleader is almost incapable of giving deserved criticism or using legitimate authority to correct someone for fear that such criticism could jeopardize their relationships with team members.

**Ghost Leader (low task; low people).** These people—almost like ghosts—use a delegate-and-disappear management style. Since they are not committed to either task accomplishment or maintenance, they essentially allow the team to do whatever it wishes. Ghost leaders prefer to detach themselves from the team process by allowing group members to suffer from a series of power struggles.

The most desirable place for a leader to be along the two axes at most times would be the team leader position (9 on task, 9 on people). However, remember that most of us fall somewhere in the middle of the two scales.

And, at times, we may need to use techniques of the other three leadership styles. For example, by playing the ghost leader, you may step back at times to allow your team to gain self-reliance and self-confidence.

At other times, you may need to be the taskmaster to help instill a sense of discipline in an unmotivated worker. By carefully studying the situation and the forces affecting it, you will know which leadership style you need to use to achieve the desired result.

## Management Style

Let's see what your individual management style is. We are going to take a short test. There are no right or wrong answers on this test. You cannot fail. What the test will tell you is your natural management style.

(Distribute the "Blake and Mouton Managerial Grid Questionnaire" handout from Handouts/Overheads at the end of this lesson plan. Tell students how to complete the form.)

Tell the students to answer each question, using the scale of numbers from zero (never) to five (always).

## Scoring the Grid

After students have answered the questions, they need to transfer their answers to the corresponding numbered space provided in the scoring section. (Example: The answer to question No. 1 goes in column one; the answer to question No. 2 goes in column two. Question No. 3's answer goes in column two, and so on.)

Next, total the scores in the two columns. Then multiply each total by 0.2. For example, in the first column (People), if they answered 5, 3, 4, 4, 3, 2, 5, 4, 3, then their final score is  $33 \times 0.2 = 6.6$ . This final score is plotted along the vertical axis in the grid.

Next, total the final score for the second column (Task), and plot this score on the horizontal axis of the grid.

Finally, have them intersect the lines to see in what area they normally operate: taskmaster, ghost leader, team leader, or cheerleader.

## People and Missions

Finally review the students' work with them and summarize.

Some may ask, "To get a perfect score, I would have to max out statements 2 (Nothing is more important than accomplishing a goal or task) and 14 (Nothing

is more important than building a great team). But wouldn't this be a paradox?"

One of the mottos of the U.S. Army is "People and mission first." That is, nothing is more important than accomplishing the mission, and nothing is more important than looking out for the welfare of the people. A good leader can do both!

## Relationships With Others

"When correcting mistakes, I do not worry about jeopardizing relationships." Some people might believe that a "people person" would put a low score to this question. They might believe that a people-oriented person would not want to jeopardize a relationship.

But, if a leader really cares about the person, would the relationship (being friends) be more important or would guiding the person on to the correct behavior be more important? Let's put it in a leader-teacher relationship. If you did not correct your learner's mistakes, would that make you a more "people" teacher? I don't think so. Good leaders do what it takes to build and develop the people around them. The relationship is not what makes them tick; guiding others on to greatness is what a people leader is all about.

This question helps separate the cheerleaders, who want to be friends with everyone, from the ghost leaders, who are afraid they might make waves. The real team leaders are concerned with coaching others so they benefit the team. Think of it this way: If a leader lets someone continue his incorrect behavior, does this help or hinder the other members of the team? It is best to picture a people leader not as a friend, but as a person who is deeply concerned with the growth and welfare of others.

## WHAT IS LEADERSHIP?

Leadership is the process by which a person unifies a group and influences its members to achieve a particular task or objective.

A person does this using leadership attributes (beliefs, values, ethics, character, knowledge, and skills).

Although your title as club president, team captain, or committee chairperson gives you certain authority in your group, the title alone does not make you a leader. It simply puts you in charge.

Mere title holders are satisfied simply to TELL people to do something. True leaders are able to MOTIVATE people to do their best to reach goals and objectives.

Managers are people who do things right,  
while leaders are people who do the right thing.

—Warren Bennis, Ph.D., *On Becoming a Leader*

## LEADERSHIP THEORIES

Some personality traits may lead people naturally into leadership roles. This is the *trait theory*.

A crisis or important event may cause a person to rise to the occasion, which brings out extraordinary leadership qualities in an ordinary person. This is the *great events theory*.

People can choose to become leaders. People can learn leadership skills. This is the *transformational leadership theory*. It is the most widely accepted theory today.

## ELEVEN PRINCIPLES OF LEADERSHIP

- **Know yourself and seek self-improvement.** Know your strengths and weaknesses. Strengthen yourself through classwork, outside reading or study, and other activities.
- **Be good at doing your job.** Know your own job and duties, but also have a solid familiarity with the jobs and duties of those under you.
- **Seek responsibility and take responsibility for your actions.** Search for ways to guide your organization to new heights. When things go wrong, do not blame others. Analyze the situation, take corrective action, and move on to the next challenge.
- **Make good, timely decisions.** Use good problem-solving, decision-making, and planning tools.
- **Set the example.** Be a good role model for others. Don't just tell people what to do; show them by doing it yourself.
- **Know and care about people.** By your actions, show the members of your group that you sincerely care about them as people.
- **Keep the group informed.** Communicate effectively with all group members.
- **Promote a sense of responsibility.** Help group members develop good character traits that will help them carry out their responsibilities.
- **Make sure things get done.** Be certain that people understand their assigned tasks. Supervise their work, as needed, until it is completed. Communication is the key to this responsibility.
- **Train people as a team.** Although many "leaders" talk about "their team," they do little to promote a true team spirit. Create a true team spirit in your group.
- **Use the full capabilities of your group.** By developing a team spirit, you can help your group reach its highest potential.

## FACTORS OF LEADERSHIP

**Follower.** Different people require different styles of leadership. For example, a new member of your group requires more help than someone who's been a member for a long time. A person with a bad attitude requires a different approach from one who's enthusiastic and highly motivated. The first step is to understand the needs, emotions, and motivations of your members.

**Leader.** You must have an honest understanding of your capabilities. Know who you are, what you know, and what you can do. However, note that the followers, not the leader, determine if a leader is successful. To be successful you have to convince your followers, not yourself or your superiors, that you are worthy of being followed.

**Communication.** Build trust in yourself among your followers. Build trust through your words and actions. Much of what they "hear" from you will be nonverbal communication. For instance, when you set the example, this communicates that you would not ask members to do anything that you would not be willing to do. What you communicate and how you communicate it either builds or harms the relationship between you and those you are trying to lead.

**Situation.** All situations are different. What you do in one leadership situation will not always work in another situation. You must use your judgment to decide the best course of action and the leadership style needed for each situation. For example, you may need to confront someone for inappropriate behavior, but if the confrontation is too late or too early, too harsh or too weak, the results may prove ineffective.

## ATTRIBUTES OF GOOD LEADERS

**BE a professional.** Be loyal to the organization, perform selfless service, and take personal responsibility.

**BE someone with good character traits.** Seek to show honesty, competence, candor, commitment, integrity, courage, straightforwardness, and imagination.

**KNOW the four factors of leadership.** The factors include followers, leader, communication, and situation.

**KNOW yourself.** Know the strengths and weakness of your character; know your knowledge and skills.

**KNOW human nature.** Be aware of human needs and emotions and how people respond to stress.

**KNOW your job.** Be proficient and be able to train others in their tasks.

**KNOW your organization.** Where can you go for help? What are its values and background? Who are the unofficial leaders?

**DO provide direction.** Encourage group members to participate in goal setting, problem solving, decision making, and planning.

**DO implement.** See that a job gets done by using your skills to communicate, coordinate, supervise, and evaluate.

**DO motivate.** Help develop group moral and a team spirit in the organization: train, coach, and counsel members.



## TYPES OF LEADERS

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And, at times, we may need to use techniques of the other three leadership styles. For example, by playing the ghost leader, you may step back at times to allow your team to gain self-reliance and self-confidence. At other times, you may need to be the taskmaster to help instill a sense of discipline in an unmotivated worker. By carefully studying the situation and the forces affecting it, you will know which leadership style you need to use to achieve the desired result.

## BLAKE AND MOUTON MANAGERIAL GRID QUESTIONNAIRE

Below is a list of statements about leadership behavior. Read each one carefully. Then, using the scale below, decide the extent to which it actually applies to you. For best results, answer as truthfully as possible.

Never		Sometimes		Always
0	1	2	3	4
				5

1. \_\_\_\_\_ I encourage my team to participate when it is decision-making time and I try to implement their ideas and suggestions.
2. \_\_\_\_\_ Nothing is more important than accomplishing a goal or task.
3. \_\_\_\_\_ I closely monitor the schedule to ensure a task or project will be completed in time.
4. \_\_\_\_\_ I enjoy coaching people on new tasks and procedures.
5. \_\_\_\_\_ The more challenging a task is, the more I enjoy it.
6. \_\_\_\_\_ I encourage my employees to be creative about their jobs.
7. \_\_\_\_\_ When seeing a complex task through to completion, I ensure that every detail is accounted for.
8. \_\_\_\_\_ I find it easy to carry out several complicated tasks at the same time.
9. \_\_\_\_\_ I enjoy reading articles, books, and journals about training, leadership, and psychology and then putting what I have read into action.
10. \_\_\_\_\_ When correcting mistakes, I do not worry about jeopardizing relationships.
11. \_\_\_\_\_ I manage my time very efficiently.
12. \_\_\_\_\_ I enjoy explaining the intricacies and details of a complex task or project to my employees.
13. \_\_\_\_\_ Breaking large projects into small manageable tasks is second nature to me.
14. \_\_\_\_\_ Nothing is more important than building a great team.
15. \_\_\_\_\_ I enjoy analyzing problems.

## BLAKE AND MOUTON MANAGERIAL GRID QUESTIONNAIRE (CONTINUED)

16. \_\_\_\_\_ I honor other people's boundaries.
17. \_\_\_\_\_ Counseling my employees to improve their performance or behavior is second nature to me.
18. \_\_\_\_\_ I enjoy reading articles, books, and trade journals about my profession and then implementing the new procedures I have learned.

### Scoring Section

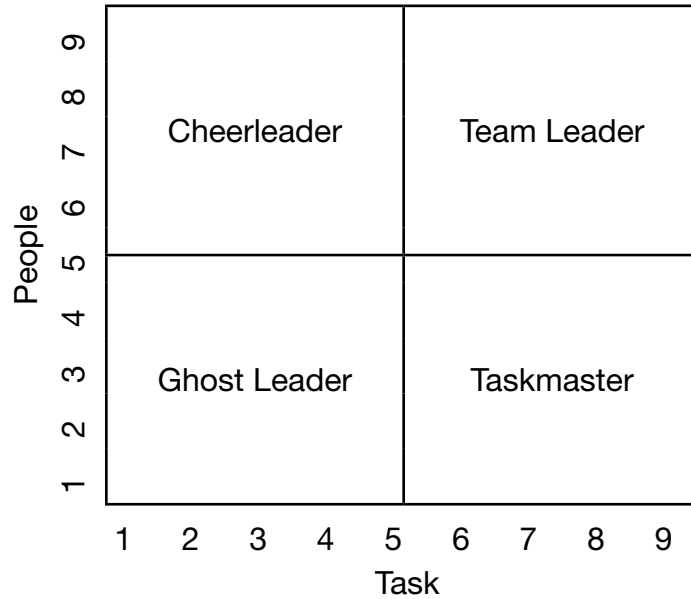
After completing the questionnaire, transfer your answers to the spaces below:

People Question	Task Question
1. _____	2. _____
4. _____	3. _____
6. _____	5. _____
9. _____	7. _____
10. _____	8. _____
12. _____	11. _____
14. _____	13. _____
16. _____	15. _____
17. _____	18. _____
TOTAL _____	TOTAL _____
X 0.2 = _____	x 0.2 = _____

(Multiply the total by 0.2 to get your final score.)

# BLAKE AND MOUTON MANAGERIAL GRID QUESTIONNAIRE (CONTINUED)

Plot your final scores on the graph below by placing a dot next to the people score on the vertical axis, and a dot next to the task score on the horizontal axis. Then, draw two lines from each dot until they intersect. The area of intersection is the leadership dimension from which you operate.



Adapted from Blake and Mouton's Managerial Grid (1985).

This chart will give you an idea of your leadership style. But, remember that this is only one indicator. You also have to consider other questions: How do other people rate you as a leader? Do you get your job done? Do you look out for the welfare of others?

A perfect score is a nine in both categories (People and Tasks). You should review the statements in the survey and reflect on the low scores by asking yourself, "If I scored higher in that area, would I be a more effective leader?" And if the answer is yes, then it should become a personal action item.

# WORKSHOP LESSON PLAN

## TIME MANAGEMENT

### Description

This session introduces time management skills and how to improve daily performance.

### Learning Objectives

After completing this session, the student should know:

- Basic time management principles
- Their own time management needs
- Various successful time-management techniques to improve productivity

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Five overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of five handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Background

(Display the “Time Management” overhead from Handouts/Overheads at the end of this lesson plan.)

Tell students: There is no mystery about managing time. Everyone has 24 hours each day and 168 hours each week to eat, sleep, work, relax, exercise, attend class, and study. There is nothing magical about getting the most from these hours; it just takes planning.

But it also takes self-discipline and control until time management becomes an everyday habit. Plans and schedules for managing time are useless if you do not follow them.

The main reason for managing time is to provide structure to your life and, in turn, piece of mind. Managing time is just something you do for your own psyche, to make your days easier.

## Purpose of Strategies

(Display the “Time Management Strategies” overhead from Handouts/Overheads at the end of this lesson plan.)

Time management strategies fulfill a number of functions. One purpose is to plan activities and schedule time for completing them. The strategies help you predict when you will be busiest so that plans to get things done may be made ahead of time. A second purpose is to help you become more punctual. Time management strategies also aid in remembering obligations such as meetings, appointments, and special events.

## Some Advantages

One advantage of time management strategies is that they don’t take much time to implement! For example, semester planners for students can be completed in about an hour and weekly grids in only 15 minutes. It only takes about 10 minutes each week to keep schedules up to date by making additions and revisions. In addition, the strategies are easy to use and require little instruction from facilitators.

As time management skills improve, people tend to experience fewer stressful situations resulting from procrastination and/or overextending (trying to do too many activities). Time management strategies give people a sense of control over their lives.

Time management strategies also serve as a useful memory aid, reminding you of obligations that must be met at certain times in the day or week or month. They help to organize certain aspects of your life as well.

## How Do You Use Time?

Let’s see how you are using your time. We are going to fill in two simple questionnaires. Only you will see your answers.

(Distribute the “Evaluate Initial Skills: A Reflective Survey” and “Evaluate Initial Skills: A Quantitative Survey” handouts from Handouts/Overheads at the end of this lesson plan.)

Give the students time to fill out the surveys.

There are several ways to evaluate how well a particular time management strategy is working. The first thing to do when you feel the strategies aren’t working is to consider whether this is because you are trying to do too much. Have you bitten off more than you can chew? Do you have unrealistic expectations about the number of classes and activities you can handle?

Use journals or color-coded schedules to evaluate time spent on academics versus social events. Ask the opinion of an impartial third party, like a coach, adviser, instructor, or tutor.

If you still feel your schedule is realistic, and the strategies are the problem, try using other time management strategies. Add motivational strategies, or techniques for improving your attention and concentration.

To evaluate your progress with time management strategies, compare how you planned to spend your time with how that time actually was spent. Use two copies of the weekly schedule—put your planned schedule on one and record how you actually spent your time in the other. Compare the two after a few weeks. Did you accomplish all you set out to do? If not, why not?

Was the schedule unrealistic? It could be that you underestimated the time required to complete tasks, unexpected activities were assigned, or you are just trying to do too much.

Or, you may have postponed study for other activities. If so, what types of nonacademic activities

were done during scheduled study times? Did you spend twice as many hours studying outside class as were spent in class? If not, why not? What were the results?

Another approach is to use just one copy of the schedule. Each time a task is completed by the scheduled time, check it off. If you end up with a lot of checks, you are probably managing time efficiently. If there are few checks, you may not be managing time well. Why not? Was the schedule unrealistic? Or did you forego studying for other activities?

## Space Study Periods

Learning occurs in spurts. The best way to use study time is to work for short periods of time on different subjects or tasks. Spacing reviews and activities is important because it helps to maintain interest and concentration. It helps you remember what you studied.

The attention span of most people is 20 to 30 minutes. Therefore, study time should be divided into half-hour sessions for working on different activities or subjects. Switching from one subject to another helps you avoid boredom and daydreaming. Mixing up activities helps you process information in a variety of ways.

To avoid forgetting information that is uninteresting or unfamiliar, you should review periodically.

## Develop a Plan of Action

Consider the following example. A student sets aside three hours to study one night. Because studying for six half-hour sessions is much more effective than studying for three straight hours, the student plans this study schedule. Notice that different activities are included in the plan.

- 6:30 A.M.–7 A.M.— History: Preview Chapter 6 and read first section
- 7 A.M.–7:30 A.M.— History: Review and reorganize today's lecture notes
- 7:30 A.M.–8 A.M.— Psychology: Make flash cards for Chapter 3
- 8 A.M.–8:30 A.M.— Reward: Watch favorite TV show
- 8:30 A.M.–9 A.M.— History: Read second section of Chapter 6

9 A.M.–9:30 A.M.— Physics: Preview tomorrow's lab assignment

9:30 A.M.–10 A.M.— History: Read last section of Chapter 6 and review

The following tips can help students space reviews effectively to enhance encoding of information into memory.

Develop a plan for studying, considering what must be done and how much time you have to do it. Any combination of these activities may be included in the study plan: complete reading assignments, complete lab assignments, complete homework problems, meet with the instructor or tutors, meet with study group members, reorganize or recopy lecture notes, review information in the notes and the readings, and prepare study aids (flash cards, practice questions, visual aids, etc.).

## Better Study Habits

(Display the "Time Management/Study Habits" overhead and distribute it as a handout from Handouts/Overheads at the end of this lesson plan.)

The activities selected will depend on the task(s) to be accomplished (e.g., exam preparation, preparation for class), the nature of the information, and personal learning styles.

**Budget the time.** Estimate how long it will take to complete each of the activities in the study plan. Organize your hours to include ample time for completing the activities, relaxing, and sleeping. Daily and weekly grids are effective means of budgeting time. Make up a schedule and stick to it. Allowing for rewards or considering how sticking to the schedule will fulfill your goals are good ways to get motivated.

**Space reviews.** Break the study time into manageable amounts of time to avoid boredom and loss of concentration, and in turn, to improve learning. Sessions lasting 20 to 30 minutes are best. Mix activities (outlining, reviewing, organizing, etc.) so the information is processed in a number of ways. Studying for six half-hour sessions is much more effective than studying for three straight hours.

**Repetition.** Learning increases when you review the material several times. The key to making repetition effective is to space the reviews so different material

is covered in consecutive review sessions. Or, mix up the activities so you are processing the information in a variety of ways in each study session.

**Use spare time wisely.** Short periods of downtime between classes or before meals may be used effectively as review sessions. Use such opportunities for simple tasks, like flipping through flash cards or working a few math problems.

**Avoid procrastination.** There are several reasons you should avoid procrastination. First, procrastinators who do poorly on an assignment may attribute the failure to lack of ability rather than poor time management. Once you lose confidence in your abilities, it is difficult to get it back. Second, putting off tasks until the last minute often results in stress and anxiety, which affect your performance and even your health. Third, procrastination often leads to feelings of guilt, as you think about all the things you should be doing. Fourth, procrastinators are particularly susceptible to Murphy's Law, "If something can go wrong, it will," because they don't leave enough time to complete a task, let alone make allowances for unforeseen difficulties. Finally, habitual procrastination causes you to be viewed negatively by others.

There are varying degrees of procrastination. If a student is satisfied with both achievements and performance on assignments, and if the student can complete late assignments without getting stressed out, then procrastination may not be too serious a problem. Only minor behavioral changes may be necessary to avoid procrastinating in the future. However, if grades suffer and stress results from putting things off, then procrastination is a serious problem. In this case major behavioral modification is probably necessary.

So how can you avoid falling into the downward spiral brought on by procrastination? The guidelines below may provide procrastinators with the strategies needed to break out of that behavioral cycle.

## Non-Procrastination Plan

(Display the "A Non-Procrastination Plan" overhead and distribute it as a handout from Handouts/Overheads at the end of this section.)

**Make a schedule.** Allocate specific times to complete tasks using semester, monthly, weekly, or daily planners.

**Get motivated.** It does no good to make a schedule if you don't follow it. Work with a friend to motivate each other. Consider how long-term and short-term goals will be fulfilled by getting things done on time. Visualize how it felt to get tasks done on time in the past, and remember how stressful it was to put off work.

**Re-evaluate your priorities.** How do you prioritize success in school, social life, work, and other activities in your life? If school is your first priority, that work must come before any other activities. If you decide success in school is not your first priority, then don't expect high grades.

**Take responsibility.** Don't make excuses to yourself for procrastinating, and don't blame others when distracted. Saying, "I'm so busy I never get to . . ." is just an excuse and a form of procrastination. Staying on track is a personal responsibility. It's in your hands.

**Examine cause-and-effect relationships.** Step back and critically examine cause-and-effect relationships in your life. How do you explain failures? To what factors do you attribute them? Be honest. Did you receive a poor grade on a project because you started it late or didn't put in enough time? Avoid rationalizations like, "The teacher doesn't like me" or, "I didn't understand the assignment." Thoughtfully examine the results of your behavior.

**Think hard about working under pressure.** Some people describe themselves as working better under pressure. If you feel this way, honestly and critically evaluate the validity of that statement. For example, when you work under pressure, are you really turning in your best work? If not, procrastination is having a negative impact on you. If you really think you are doing your best, make sure the pressure comes from you and not someone else.

**Try variety, the spice of life.** Make two activity lists: "Things I like to do" and "Things I have to do." Mix up activities from both lists and work on each activity for a short time. Alternating between fun and distasteful tasks helps maintain motivation and interest.

**Think small.** Because it is easier to put off overwhelming tasks than small ones, divide major assignments into smaller parts and work on one part at a time.



**Be realistic.** Some people procrastinate because they have too much to do. They have every intention of doing things in a timely manner, but they run out of time. There are only 24 hours in a day. Thoughtfully examine your obligations and responsibilities. Is your schedule realistic? Are you involved in too many activities? Don't spread yourself too thin because none of your projects will get the full attention they deserve.

**Focus on assets.** Some people are good at summarizing major ideas. Others write exceptionally well. Some people work well with others. Find out what your assets are. Then, work them into everything you do. This will improve your confidence and motivation for tackling a distasteful job.

**Reward yourself.** When tasks are completed on time, treat yourself to something nice. Make the reward appropriate for the difficulty and boredom of the task.

## A Seven-Day Non-Procrastination Plan

Monday	Make tasks meaningful.
Tuesday	Divide large assignments into smaller parts.
Wednesday	Write an intention statement.
Thursday	Tell everyone about your schedules and plans.
Friday	Find a reward for doing things on time.
Saturday	Settle any problems now.
Sunday	Say "no."

## Four Types of Planners

There are four major types of time management planners: semester (or quarter), monthly, weekly, and daily. Semester and monthly planners allow you to record the due dates of major assignments, whereas weekly and daily schedules are used to record regular activities as well as due dates of assignments.

(Display the "Using Planners" overhead and distribute the "Using Planners" handout from

Handouts/Overheads at the end of this lesson plan.)

## SEMESTER PLANNER

The purpose of semester (quarter) planners is to give the student an overall idea of when major school projects and social events are scheduled. Semester planners give an overview of the major commitments you have during the course of the term.

Semester planners are useful because they help students see when they will be the busiest. Detailed plans then may be made ahead of time to complete all the assignments and activities in a timely manner to avoid procrastination. Finally, semester planners give students a sense of control over their academic and social affairs.

### Directions for Creating Semester (Quarter) Planners

Buy a large calendar or desk blotter. Or, make a homemade template to meet personal requirements. Write in the dates and times for major school projects, including:

- Examinations and quizzes
- Speeches
- Research papers
- Lab assignments
- Class projects
- Field trips

Write in the dates of important social events that can't be missed. Be selective; you can't do everything!

- Major athletic events
- Weddings
- School dances
- Club meetings and events

Put the calendar in a prominent place in your room where you can refer to it often.

## MONTHLY PLANNER

Monthly planners are similar to semester planners, except they let you plan academic and social events in more detail. More types of information and events can be organized on monthly planners.

This time management technique is useful because it encourages the student to divide major tasks into smaller parts and to develop a schedule for completing each part. Another benefit of monthly plan-

ners is they help reduce the tensions associated with procrastination. In addition, monthly planners are portable, unlike most semester planners. Finally, monthly planners give students a sense of control over their academic and social affairs.

### Directions for Creating Monthly Planners

Buy a portable, notebook-sized monthly calendar with boxes large enough to hold several pieces of information. Or, make a homemade template. Look at the major academic assignments listed on the semester planner (or course syllabi). Break each task into smaller parts. For example, a term paper may be divided into these activities: choose topic and clear it with the instructor, library research, write first draft, type first draft, have first draft proofread, make revisions, and print final draft. Develop a schedule for completing each task. Make your own due dates for each part and write them on the monthly planner. Using the term paper example: topic by week two, research by week six, first draft by week eight, type by week nine, proofread by week 10, turn in final draft by week 11. Regularly evaluate your progress on the tasks against the due dates on the monthly planner. A good time to do this is every Sunday night. Treat yourself when a major assignment has been completed according to the schedule.

### WEEKLY PLANNER

The purpose of weekly activity grids is to plan activities in a very detailed way to make the most of your time. The strategy is particularly useful during finals week or before major business activities, when you have a million things to do in a short time.

When recording coming activities on the weekly grid, be as specific as possible. Each entry should identify two things. For students, these are the topic to be studied and how it will be studied. Examples are library research for speech, write first draft of sociology paper, read physics Chapter 7, do accounting problems 1 through 5, start ceramics project, and identify memory aids for marketing test. For employees, the two necessary data are the project to be worked on and the nature of the task. Examples are prepare data tables for next year's budget, prepare visual aids for sales presentation, write correspondence about renovation project, or finish bid for bridge replacement project.

Weekly activity grids may be purchased in a bookstore or made by the individual. Bound planners bought in the store have the advantages of durability and portability. Homemade planners, on the other hand, offer the benefits of flexibility, low cost, and more detailed planning. Homemade planners also save time because activities that don't change week to week can be written on the planner before copying, eliminating the need to enter the same data every week.

Weekly activity grids may be arranged in one of two formats. They are usually blocked out in one-hour chunks of time. Each one-hour block may begin on the hour (8 A.M.–9 A.M., 9 A.M.–10 A.M., etc.) or on the half-hour (7:30 A.M.–8:30 A.M., 8:30 A.M.–9:30 A.M., etc.), depending on the school's class schedule or the employer's schedule. A less common but perfectly acceptable format is by the half-hour. For this type of weekly activity grid, time is blocked out as follows: 7 A.M.–7:30 A.M., 7:30 A.M.–8 A.M., 8 A.M.–8:30 A.M., etc. The half-hour style allows you to record activities in more detail, but the hourly format takes up less space.

Remember this rule of thumb when planning and coordinating weekly activities: Spend two hours studying outside class for every hour spent in class.

### **Directions for Creating Weekly Planners**

Design a weekly activity grid to meet personal requirements, or purchase a bound planner. Arrange the grid blocks on an hourly or half-hourly basis. Label the days of the week, starting with Sunday or Monday. The first things to record on the grid are those regular activities whose times do not change week to week. For homemade planners, record this data before copying the chart for future use. Examples of regular activities are:

- Meals
- Sleep
- Class or lab
- Worship services
- Club meetings
- Work
- Tutoring sessions
- Athletic practice, games, or exercise

Record all other activities that are not regular events. Consult the monthly planner (or course syllabi) to determine the due dates of all activities, not just the major ones. Break major assignments into smaller tasks, and identify your own due date for each part. Estimate how long it will take to complete each task. If unsure, err on the side of overestimating. Write short descriptions of each activity in the appropriate places on the weekly chart. Examples of activities are:

- Reading assignments
- Athletic games or exercise
- Study groups
- Listening to lecture tapes
- Recopying or reviewing notes
- Relaxation and recreation
- Reorganizing information
- Developing memory aids
- Reviewing notes or readings
- Club meetings or activities
- Review sessions
- Meetings with instructor, coach, or adviser
- Library research
- Lab work

Keep the completed grid, or copies of it, in a prominent place where you may refer to it often. Make it a habit to check the grid periodically, such as every morning or evening.

### **DAILY ACTIVITY GRID**

Daily activity grids serve the same function as weekly schedules—to plan in detail the activities to be completed during the day. The only difference between the two is that daily grids show only one day at a time, whereas weekly grids display seven days of activities on one chart.

Daily activity grids may be bought or made by the individual. The former often span the hours of 8 A.M. and 5 P.M. and come in portable and desktop styles. The latter may be designed to start and end at any hour. Time blocks are usually an hour long and start on the hour, but this format may be modified to suit personal preferences. Various types of information may be recorded on daily charts, including schoolwork, social events, appointments, and work duties. Tasks should be described in as much detail as possible; include the subject of the task and the specific activity to be performed.

### **Closing**

A final word on time management: Both college and trade school study loads are many times that of high school. It is important to develop and follow good work habits now to minimize study problems later.

# **TIME MANAGEMENT**

Everyone has 24 hours each day and 168 hours each week to sleep, work, relax, exercise, study, attend class, etc.

Time management requires self-discipline.

Effective time management provides a sense of control.

Managing time is something you do for your own peace of mind, to make life easier.

Doing all the things you want to do and have to do depends on setting aside time and using it effectively.

# TIME MANAGEMENT STRATEGIES

## Purposes

- Plan activities and schedule time for completing them
- Aid in remembering obligations such as meetings, appointments, and special events

## Advantages

- Easy to do
- Help relieve stress in your life
- Help you remember what you need to do in your life

## EVALUATE INITIAL SKILLS: A REFLECTIVE SURVEY

Answer the questions in this initial evaluation as honestly as possible.  
Fill in the blanks or check the answer that best describes your behavior.

I spend \_\_\_\_\_ hours per week studying outside class.

I spend \_\_\_\_\_ hours per week sleeping.

I spend \_\_\_\_\_ hours per week relaxing, recreating, and participating in social events.

I spend \_\_\_\_\_ hours per week in extracurricular activities.

I spend \_\_\_\_\_ hours per week at a wage-paying job.

For every hour in class, I spend \_\_\_\_\_ hours studying outside class on average.

I am late to a meeting, to class, to work, or to an appointment \_\_\_\_\_ times a week.

On average, I am \_\_\_\_\_ minutes late to meetings, class, work, or appointments.

When I am late, I feel \_\_\_\_\_.

I have been late to an exam in the last year. \_\_\_ Yes \_\_\_ No

I spend more time on \_\_\_\_\_ courses than \_\_\_\_\_ courses because \_\_\_\_\_.

I use short periods of downtime (between classes, before meals, etc.) to do simple academic tasks like review notes or write flash cards. \_\_\_ Yes \_\_\_ No

I use short periods of downtime (between classes, before meals, etc.) to do simple nonacademic tasks like paying bills or cleaning. \_\_\_ Yes \_\_\_ No

I have a semester planner. \_\_\_ Yes \_\_\_ No

I have a monthly planner. \_\_\_ Yes \_\_\_ No

I have a weekly planner. \_\_\_ Yes \_\_\_ No

I work better under pressure. \_\_\_ Yes \_\_\_ No

# EVALUATE INITIAL SKILLS: A REFLECTIVE SURVEY (CONTINUED)

I check my planned schedule or syllabi for upcoming assignments \_\_\_ every day \_\_\_ twice a week \_\_\_ once a week \_\_\_ every two weeks.

I would describe myself as a procrastinator. \_\_\_ Yes \_\_\_ No

I have done poorly on assignments (papers, tests, speeches, etc.) in the past because I did not spend enough time on them. \_\_\_ Yes \_\_\_ No

I have done poorly on assignments (papers, tests, speeches, etc.) in the past because I did not start them early enough. \_\_\_ Yes \_\_\_ No

The most time-consuming course this term will be \_\_\_\_\_  
because \_\_\_\_\_ .

\_\_\_\_\_ class is going to require \_\_\_\_\_ hours of work each week.

\_\_\_\_\_ class is going to require \_\_\_\_\_ hours of work each week.

\_\_\_\_\_ class is going to require \_\_\_\_\_ hours of work each week.

\_\_\_\_\_ class is going to require \_\_\_\_\_ hours of work each week.

\_\_\_\_\_ class is going to require \_\_\_\_\_ hours of work each week.

Some ways I can use short periods of downtime are:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I am going to make a semester, monthly, or weekly planner for the upcoming term.  
\_\_\_ Yes \_\_\_ No

Now examine your answers to these questions. What do they tell you about yourself? Are there aspects of time management you hadn't thought of before? Are there aspects of your time management habits that need to be improved?

## EVALUATE INITIAL SKILLS: A QUANTITATIVE SURVEY

Indicate how often the following statements describe your behavior by writing the appropriate number in the blank space.

- |  | Never<br>1 | Occasionally<br>2 | Often<br>3 | Always<br>4 |
|--|------------|-------------------|------------|-------------|
| 1. _____   |            |                   |            |             |
| I feel I have to cram before an exam.  |            |                   |            |             |
| 2. _____   |            |                   |            |             |
| My homework is usually turned in on time.  |            |                   |            |             |
| 3. _____   |            |                   |            |             |
| I think I usually get enough sleep.  |            |                   |            |             |
| 4. _____   |            |                   |            |             |
| I pull all-nighters before midterms and finals.  |            |                   |            |             |
| 5. _____   |            |                   |            |             |
| I plan to go out with friends a couple of nights a week, and usually spend the amount of time with them that I originally planned. |            |                   |            |             |
| 6. _____   |            |                   |            |             |
| When I'm working on a paper, I put off writing until a few days before it's due.   |            |                   |            |             |
| 7. _____   |            |                   |            |             |
| I often cancel social activities because I feel I don't have enough time.  |            |                   |            |             |
| 8. _____   |            |                   |            |             |
| I generally get my papers in on time.  |            |                   |            |             |
| 9. _____   |            |                   |            |             |
| I find myself making a lot of excuses to my instructors about why my work isn't done.  |            |                   |            |             |
| 10. _____  |            |                   |            |             |
| I feel comfortable about how I use time now.   |            |                   |            |             |
| 11. _____  |            |                   |            |             |
| I always feel that something is hanging over my head, and that I'll never have enough time to do the work assigned.                |            |                   |            |             |
| 12. _____  |            |                   |            |             |
| I often feel tired.  |            |                   |            |             |

Score A: Add up the numbers for questions 1, 4, 6, 7, 9, 11, and 12.

Score B: Add up the numbers for questions 2, 3, 5, 8, and 10.

If score A is greater than score B, you are probably a procrastinator. If score A is less than score B, you manage your time well. If the scores are equal, you may procrastinate at times, but procrastination is not a habit.



## TIME MANAGEMENT/STUDY HABITS

The activities selected will depend on the task(s) to be accomplished (e.g., exam preparation, preparation for class), the nature of the information, and personal learning styles.

Budget the time.

- Estimate how long it will take to complete each of the activities in the study plan.
- Organize your hours to include ample time for completing the activities, relaxing, and sleeping.
- Daily and weekly grids are effective means of budgeting time.
- Make up a schedule and stick to it. Allowing for rewards or considering how sticking to the schedule will fulfill your goals are good ways to get motivated.

Space Reviews.

- Break study time into manageable amounts of time to avoid boredom and loss of concentration, and in turn, to improve learning. Sessions lasting 20 to 30 minutes are best.
- Mix activities (outlining, reviewing, organizing, etc.) so the information is processed in a number of ways.
- Studying for six half-hour sessions is much more effective than studying for three straight hours.

Repetition.

- Learning increases when you review the material several times.
- The key to making repetition effective is to space the reviews so different material is covered in consecutive review sessions.

## **TIME MANAGEMENT/STUDY HABITS (CONTINUED)**

- Mix up the activities so you are processing the information in a variety of ways in each study session.

Use spare time wisely.

- Short periods of downtime between classes or before meals may be used effectively as review sessions.
- Use such opportunities for simple tasks, like flipping through flash cards or working a few math problems.

## A NON-PROCRASTINATION PLAN

Make a schedule.

- Allocate specific times to complete tasks using semester, monthly, weekly, or daily planners.

Get motivated.

- It does no good to make a schedule unless you follow it.
- Work with a friend to motivate each other. Consider how long-term and short-term goals will be fulfilled by getting things done on time.
- Visualize how it felt to get tasks done on time in the past, and remember how stressful it was to put off work.

Re-evaluate your priorities.

- How do you prioritize success in school, social life, work, and other activities in your life? If school is your first priority, that work must come before any other activities. If you decide success in school is not your first priority, then don't expect high grades.

Take responsibility.

- Don't make excuses to yourself for procrastinating, and don't blame others when distracted. Saying, "I'm so busy I never get to . . ." is just an excuse and a form of procrastination. Staying on track is a personal responsibility. It's in your hands.

Examine cause-and-effect relationships.

- Step back and critically examine cause-and-effect relationships in your life.
- How do you explain failures?

## A NON-PROCRASTINATION PLAN (CONTINUED)

- To what factors do you attribute them? Be honest. Did you receive a poor grade on a project because you started it late or didn't put in enough time?
- Avoid rationalizations like, "The teacher doesn't like me" or "I didn't understand the assignment."
- Thoughtfully examine the results of your behavior.

Think hard about working under pressure.

- Some people describe themselves as working better under pressure. If you feel this way, honestly and critically evaluate the validity of that statement.
- When you work under pressure, are you really turning in your best work? If not, procrastination is having a negative impact on you. If you really think you are doing your best, make sure the pressure comes from you and not someone else.

Try variety, the spice of life.

- Make two activity lists: "Things I like to do" and "Things I have to do."
- Mix activities from both lists and work on each activity for a short time.
- Alternating between fun and distasteful tasks helps maintain motivation and interest.

Think small.

- Because it is easier to put off overwhelming tasks than small ones, divide major assignments into smaller parts and work on one part at a time.

## A NON-PROCRASTINATION PLAN (CONTINUED)

Be realistic.

- Some people procrastinate because they have too much to do. They have every intention of doing things in a timely manner, but they run out of time. There are only 24 hours in a day.
- Thoughtfully examine your obligations and responsibilities.
- Is your schedule realistic?
- Are you involved in too many activities? Don't spread yourself too thin, because none of your projects will get the full attention they deserve.

Focus on assets.

- Some people are good at summarizing major ideas. Others write exceptionally well. Some people work well with others.
- Find out what your assets are. Then work them into everything you do. This will improve your confidence and motivation for tackling a distasteful job.

Reward yourself.

- Reward yourself lavishly when tasks are completed on time.
- Make the reward appropriate for the difficulty and boredom of the task.

## A NON-PROCRASTINATION PLAN (CONTINUED)

### A Seven-Day Non-Procrastination Plan

Monday	Make tasks meaningful.
Tuesday	Divide large assignments into smaller parts.
Wednesday	Write an intention statement.
Thursday	Tell everyone about your schedules and plans.
Friday	Find a reward for doing things on time.
Saturday	Settle any problems now.
Sunday	Say “no.”

# USING PLANNERS

## Semester Planners

The purpose of semester (quarter) planners is to give the student an overall idea of when major school projects and social events are scheduled. Semester planners give an overview of the major commitments you have during the course of the term. They:

- Help you see when you will be the busiest during the term.
- Help reduce the tensions associated with procrastination.
- Give you a sense of control over your academic and social affairs.

## Monthly Planners

Monthly planners are similar to semester planners, except they let you plan academic and social events in more detail. More types of information and events can be organized on monthly planners. Monthly planners:

- Encourage you to divide major tasks into smaller parts and to develop a schedule for completing each part.
- Are portable, unlike most semester planners.
- Give you a sense of control over your academic and social affairs.

## USING PLANNERS (CONTINUED)

### Weekly Activity Grids

The purpose of weekly activity grids is to plan activities in a very detailed way to make the most of your time. The strategy is particularly useful during finals week or before major business activities, when you have a million things to do in a short time.

When recording coming activities on the weekly grid, be as specific as possible.

Each entry should identify two things. For students, these are the topic to be studied and how it will be studied.

### Daily Activity Grids

Daily activity grids serve the same function as weekly schedules—to plan in detail the activities to be completed during the day. The only difference between the two is that daily grids show only one day at a time, whereas weekly grids display seven days of activities on one chart.



## USING PLANNERS

### Semester Planners

The purpose of semester (quarter) planners is to give the student an overall idea of when major school projects and social events are scheduled. Semester planners give an overview of the major commitments you have during the course of the term.

Semester planners are useful because they help students see when they will be the busiest during the term. Detailed plans then may be made ahead of time to complete all the assignments and activities in a timely manner. Another benefit of semester planners is that they help reduce the tensions associated with procrastination. Finally, semester planners give students a sense of control over their academic and social affairs.

### DIRECTIONS FOR CREATING SEMESTER (QUARTER) PLANNERS

Buy a large calendar or desk blotter. Or, make a homemade template to meet personal requirements. Write in the dates and times for major school projects, including

- Examinations and quizzes
- Research papers
- Class projects
- Speeches
- Lab assignments
- Field trips

Write in the dates of important social events that can't be missed. Be selective; you can't do everything!

- Major athletic events
- School dances
- Weddings
- Club meetings and events

Put the calendar in a prominent place in your room where you may refer to it often.

## USING PLANNERS (CONTINUED)

### Monthly Planners

Monthly planners are similar to semester planners, except they let you plan academic and social events in more detail. More types of information and events can be organized on monthly planners.

This time management technique is useful because it encourages the student to divide major tasks into smaller parts and to develop a schedule for completing each part. Another benefit of monthly planners is they help reduce the tensions associated with procrastination. In addition, monthly planners are portable, unlike most semester planners.

Finally, monthly planners give students a sense of control over their academic and social affairs.

### DIRECTIONS FOR CREATING MONTHLY PLANNERS

Buy a portable, notebook-sized monthly calendar with boxes large enough to hold several pieces of information. Or, make a homemade template. Look at the major academic assignments listed on the semester planner (or course syllabi). Break each task into smaller parts. For example, a term paper may be divided into these activities: choose topic and clear it with the instructor, library research, write first draft, type first draft, have first draft proofread, make revisions, and print final draft.

Develop a schedule for completing each task. Make your own due dates for each part and write them on the monthly planner. Using the research paper example: topic by week two, research by week six, first draft by week eight, type by week nine, proofread by week 10, turn in final draft by week 11. Regularly evaluate your progress on the tasks against the due dates on the monthly planner. A good time to do this is every Sunday night. Treat yourself when a major assignment has been completed according to the schedule.

## USING PLANNERS (CONTINUED)

### Weekly Activity Grids

The purpose of weekly activity grids is to plan activities in a very detailed way to make the most of your time. The strategy is particularly useful during finals week or before major business activities, when you have a million things to do in a short time.

When recording coming activities on the weekly grid, be as specific as possible. Each entry should identify two things. For students, these are the topic to be studied and how it will be studied. Examples are: library research for speech, write first draft of sociology paper, read physics Chapter 7, do accounting problems 1 through 5, start ceramics project, and identify memory aids for marketing test.

Weekly activity grids may be purchased in a bookstore or made by the individual. Bound planners bought in the store have the advantages of durability and portability. Homemade planners, on the other hand, offer the benefits of flexibility, low cost, and more detailed planning. Homemade planners also save time because activities that don't change week to week can be written on the planner before copying, eliminating the need to enter the same data every week.

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## USING PLANNERS (CONTINUED)

A less common but perfectly acceptable format is by the half-hour. For this type of weekly activity grid, time is blocked out as follows: 7 A.M.–7:30 A.M., 7:30 A.M.–8 A.M., 8 A.M.–8:30 A.M., etc. The half-hour style allows you to record activities in more detail, but the hourly format takes up less space. Remember this rule of thumb when planning and coordinating weekly activities: spend two hours studying outside class for every hour spent in class.

### DIRECTIONS FOR CREATING WEEKLY PLANNERS

Design a weekly activity grid to meet personal requirements, or purchase a bound planner. Arrange the grid blocks on an hourly or half-hourly basis. Label the days of the week, starting with Sunday or Monday.

The first things to record on the grid are those regular activities whose times do not change week to week. For homemade planners, record this data before copying the chart for future use. Examples of regular activities are:

- Meals
- Class or lab
- Club meetings
- Tutoring sessions
- Sleep
- Worship services
- Work
- Athletic practice, games, or exercise

Record all other activities that are not regular events. Consult the monthly planner (or course syllabi) to determine the due dates of all activities, not just the major ones. Break major assignments into smaller tasks, and identify your own due date for each part. Estimate how long it will take to complete each task. If unsure, err on the side of overestimating. Write short descriptions of each activity in the appropriate places on the weekly chart.

## **USING PLANNERS (CONTINUED)**

Examples of activities are:

- Reading assignments
- Athletic games or exercise
- Study groups
- Listening to lecture tapes
- Recopying or reviewing notes
- Relaxation and recreation
- Reorganizing information
- Reviewing notes or readings
- Club meetings or activities
- Review sessions
- Meetings with instructor, coach, or adviser
- Library research
- Lab work

Keep the completed grid, or copies of it, in a prominent place where you may refer to it often. Make it a habit to check the grid periodically, such as every morning or evening.

### **Daily Activity Grids**

Daily activity grids serve the same function as weekly schedules—to plan in detail the activities to be completed during the day. The only difference between the two is that daily grids show only one day at a time, whereas weekly grids display seven days of activities on one chart.

## USING PLANNERS (CONTINUED)

Daily activity grids may be purchased or made by the individual. The former often span the hours of 8 A.M. and 5 P.M. and come in portable and desktop styles. The latter may be designed to start and end at any hour. Time blocks are usually an hour long and start on the hour, but this format may be modified to suit personal preferences. Various types of information may be recorded on daily charts, including schoolwork, social events, appointments, and work duties. Tasks should be described in as much detail as possible; include the subject of the task and the specific activity to be performed. See the section on weekly activity grids for more directions.

# WORKSHOP LESSON PLAN

## MEETING MANAGEMENT

### Description

This session introduces meeting management skills.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of managing meetings
- The role of effective meeting management in leadership
- Various techniques of successful meeting management

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Eight overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of three handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Conducting Meetings

Ask the students, “Why do we hold meetings?” Write answers down on a flip chart. Post the flip chart where all can see it during the session.

Ask the students, “What do you like or dislike about meetings and why?” Write the answers down on a flip chart. (Don’t forget to include the reasons for what they like or dislike about meetings.) Post the flip chart where all can see it during the session.

One of the biggest complaints about most organizations is about meetings: they waste too much of our precious time. This is bad news for organizations. Meetings are important because they are where an organization’s culture and climate perpetuate themselves. Meetings are one of the ways an organization tells its members, “You are a member.” If you have bad, boring, and time-wasting meetings, then the people who attend begin to believe this is a bad and boring organization that does not care about time or its members. Likewise, great meetings tell the members, “This is a GREAT organization to belong to!” Also, remember that bad meetings lead to more bad meetings, and this causes members to quit.

Why are there so many bad meetings? Reasons include poor planning by the meeting’s organizer and a lack of involvement by the participants.

(Distribute the “Guidelines for Conducting Effective Meetings” handout from Handouts/Overheads at the end of this lesson plan.)

## Prepare for the Meeting

Ask students, “What needs to be done to prepare for a meeting?” Write their answers on a flip chart.

Define the objectives and desired outcomes. Know what you are trying to achieve by having a meeting.

Determine if a different activity could be used instead of a meeting. A lot of unnecessary meetings are called when a couple of phone calls, e-mails, or one-on-ones would have worked better.

Determine topics to cover and the best format for the discussion of each one. Know what you want to accomplish by the meeting.

Estimate the length of the meeting. People need to know how much time to plan for the meeting.

## Create an Agenda

(Display the “Steps to Effective Meetings: Step 1—Create an Agenda That Is Carefully Scripted” overhead from Handouts/Overheads at the end of this lesson plan.)

- Give start and stop times. Time is money; plan wisely!
- Identify the place of the meeting.
- List participants and guests.
- List the participants’ roles and what you expect from them. This will allow them to gather all the relevant data they need to bring to the meeting.
- Prepare a structured discussion to frame the purpose, topics, and direction of the meeting.
- Deliver the agenda in advance so the participants have time to plan and prepare for the meeting.
- Make every meeting a learning event. Incorporate creative and cutting-edge education on your particular topic by using books, speakers, or videos. The people attending are giving up their time for you; you need to give something back to them.
- Use a variety of tools and activities to make the meeting productive and fun. Get them charged up!

## Prepare to Attend (For All Participants)

- Know the purpose of the meeting. Know your purpose for attending.
- Gather all data you need to bring to the meeting.
- Know the agenda of the meeting and ensure that your agenda coincides with the meeting agenda.
- Know your role and the path you are going to follow.
- Arrive on time and be prepared to stay until at least the planned stop time.
- Take the meeting seriously, but do have some fun while attending.

## Set Up the Meeting Place

(Display the “Steps to Effective Meetings: Step 2—Set up the Meeting Place” overhead from Handouts/Overheads at the end of this lesson plan.)

- Select a physical setting that is comfortable and big enough, and that suits the needs of your meeting.



- Create a warm and attractive atmosphere conducive to interaction.
- Provide appropriate refreshments.
- Have appropriate visual aids and learning aids on hand.
- Always do something a little different and something new. Make them glad that they came.

## Assign a Note Taker

(Display the “Steps to Effective Meetings: Step 3—Assign a Note Taker (Minutes)” overhead from Handouts/Overheads at the end of this lesson plan.)

- Who attended
- What problems were discussed
- Key decisions reached
- Next steps (action items)
- Who needs to accomplish a task—list team and outside members
- Start and end date of task
- What exactly needs to be accomplished

## Start the Meeting

(Display the “Steps to Effective Meetings: Step 4—Start the Meeting” overhead from Handouts/Overheads at the end of this lesson plan.)

- Communicate the purpose and desired outcomes to all participants.
- Clarify the type of participation and interaction desired.
- Set the ground rules.
- Determine when the meeting will end.
- Establish how each member will be heard.
- Set how conflict will be resolved.
- Determine what is expected of each member.
- Decide how confidential topics will be handled.
- Show participants that you value their ideas, opinions, and questions.

## Conduct the Meeting

(Display the “Steps to Effective Meetings: Step 5—Conduct the Meeting” overhead from Handouts/Overheads at the end of this lesson plan.)

- Take time to tell and hear stories. Be creative in how you share them.
- Clarify and paraphrase key ideas.

- Ask for different points of view; protect new ideas.
- Use brainstorming techniques.
- Record ideas and notes on a flip chart:
  - Use bright colors and bold shapes.
  - Use pictures as well as text.
  - Use bullets to emphasize key points.
  - Use no more than seven words per line and seven lines per chart.
  - Keep all flip charts posted so you can refer to them.
  - At the end of the meeting, give them to the note taker so they can be incorporated into the minutes.
- Ask open-ended questions to encourage participation and input.
- Keep the focus on ideas, not on people.
- Assign next steps throughout the meeting. Make all next steps specific assignments.
- Stay focused on the agenda topics. Don’t wander off topic or become distracted. Agendas are worth taking seriously, but do not stifle creativity or insult participants who stray.

## Keep the Meeting Focused

(Display the “Steps to Effective Meetings: Step 6—Keep the Meeting Focused and Moving” overhead from Handouts/Overheads at the end of this lesson plan.)

- Get information and data from the meeting. Ensure that people are heard.
- Let the people carry the content; you guide the process.
- Acknowledge and reinforce constructive contributions.
- Use the agenda to stay on track.
- Vary the pace: speed up, slow down, take breaks, and change tacks.
- Keep the group aware of where they are in the process.
- Periodically summarize important points and ask for agreement.
- Help the group reach consensus and reach conclusions.

## Closing the Meeting

(Display the “Steps to Effective Meetings: Step 7—Closing the Meeting” overhead from Handouts/Overheads at the end of this lesson plan.)

- Help the group decide on next steps.
- Review assigned next steps. Ensure that all people know the duties they are to perform. Make sure everyone goes from “meeting” to “doing.”
- Conclude by summarizing the group’s accomplishments.
- Thank group members sincerely for their participation and contributions.

## Follow Up (Action Items)

(Display the “Steps to Effective Meetings: Step 8—Follow Up (Action Items)” overhead from Handouts/Overheads at the end of this lesson plan.)

- Evaluate the meeting. What worked? What needs improvement?
- Plan post-meeting logistics.
- Use the minutes and your impressions to create a document that clearly describes the meeting.
- Use comments, questions, criticisms, and insights to enhance the quality of the document.
- Distribute the document to all participants and other essential players within the organization.
- Monitor progress on next steps.

## Meeting Monsters

(Distribute the “Meeting Monsters” handout from Handouts/Overheads at the end of this lesson plan and briefly review the “monsters.”)

Divide the group into three subgroups and give each subgroup a transparency of one of the pages of the handout and a transparency pen. Each group is to come up with ways of dealing with the three monsters on their page. Allow 10 to 15 minutes.

Each subgroup presents their responses on the overhead projector. Other groups seek clarification and provide alternative responses.

(Distribute the “How to Deal With Meeting Monsters” handout from Handouts/Overheads at the end of this lesson plan. Discuss any items not included in the students’ presentations.)

## Closing

Close this session by reminding the students about their first lists of meeting likes and dislikes posted around the room, using some of the following questions:

- Which meeting monster is most prevalent in your meetings?
- Which monster is most difficult to deal with? Why?
- What are some general principles for dealing with meeting monsters?
- What team norms help deal with meeting monsters?
- What are some things you will do differently as a result of this exercise?
- What will you recommend that your team do to deal with meeting monsters?

## GUIDELINES FOR CONDUCTING EFFECTIVE MEETINGS

### **Prepare for the meeting.**

Define the objectives and desired outcomes. Know what you are trying to achieve by having a meeting.

Determine if a different activity could be used instead of a meeting. A lot of unnecessary meetings are called when a couple of phone calls, e-mails, or one-on-ones would have worked better.

Determine topics to cover and the best format for the discussion of each one. Know what you want to accomplish by the meeting.

Estimate the length of the meeting. People need to know how much time to plan for the meeting.

### **Create an agenda that is carefully scripted.**

- Give start and stop times. Time is money; plan wisely!
- Identify the place of the meeting.
- List participants and guests.
- List the participants' roles and what you expect from them. This will allow them to gather all the relevant data they need to bring to the meeting.
- Prepare a structured discussion to frame the purpose, topics, and direction of the meeting.
- Deliver the agenda in advance so the participants have time to plan and prepare for the meeting.

## GUIDELINES FOR CONDUCTING EFFECTIVE MEETINGS (CONTINUED)

- Make every meeting a learning event. Incorporate creative and cutting-edge education on your particular topic by using books, speakers, or videos. The people attending are giving up their time for you; you need to give something back to them.
- Use a variety of tools and activities to make the meeting productive and fun. Get them charged up!

### **Prepare to attend the meeting (for all participants).**

- Know the purpose of the meeting. Know your purpose for attending.
- Gather all data you need to bring to the meeting.
- Know the agenda of the meeting and ensure that your agenda coincides with the meeting agenda.
- Know your role and the path you are going to follow.
- Arrive on time and be prepared to stay until at least the planned stop time.
- Take the meeting seriously, but do have some fun while attending.

### **Set up the meeting place.**

- Select a physical setting that is comfortable and big enough, and that suits the needs of your meeting.
- Create a warm and attractive atmosphere conducive to interaction.
- Provide appropriate refreshments.
- Have appropriate visual aids and learning aids on hand.
- Always do something a little different and something new. Make them glad they came.

## GUIDELINES FOR CONDUCTING EFFECTIVE MEETINGS (CONTINUED)

### Assign a note taker (minutes).

- Who attended
- What problems were discussed
- Key decisions reached
- Next steps (action items)
- Who needs to accomplish a task—list team and outside members
- Start and end date of task
- What exactly needs to be accomplished

### Start the meeting.

- Communicate the purpose and desired outcomes to all participants.
- Clarify the type of participation and interaction desired.
- Set the ground rules.
- Determine when the meeting will end.
- Establish how each member will be heard.
- Set how conflict will be resolved.
- Determine what is expected of each member.
- Decide how confidential topics will be handled.
- Show participants that you value their ideas, opinions, and questions.

### Conduct the meeting.

- Take time to tell and hear stories. Be creative in how you share them.
- Clarify and paraphrase key ideas.

## GUIDELINES FOR CONDUCTING EFFECTIVE MEETINGS (CONTINUED)

- Ask for different points of view; protect new ideas.
- Use brainstorming techniques.
- Record ideas and notes on a flip chart:
  - Use bright colors and bold shapes.
  - Use pictures as well as text.
  - Use bullets to emphasize key points.
  - Use no more than seven words per line and seven lines per chart.
  - Keep all flip charts posted so you can refer to them.
  - At the end of the meeting, give them to the note taker so they can be incorporated into the minutes.
- Ask open-ended questions to encourage participation and input.
- Keep the focus on ideas, not on people.
- Assign next steps throughout the meeting. Make all next steps specific assignments.
- Stay focused on the agenda topics. Don't wander off topic or become distracted. Agendas are worth taking seriously, but do not stifle creativity or insult participants who stray.

### **Keep the meeting focused and moving.**

- Get information and data from the meeting. Ensure that people are heard.
- Let the people carry the content; you guide the process.
- Acknowledge and reinforce constructive contributions.

## GUIDELINES FOR CONDUCTING EFFECTIVE MEETINGS (CONTINUED)

- Use the agenda to stay on track.
- Vary the pace: speed up, slow down, take breaks, and change tacks.
- Keep the group aware of where they are in the process.
- Periodically summarize important points and ask for agreement.
- Help the group reach consensus and reach conclusions.

### Close the meeting.

- Help the group decide on next steps.
- Review assigned next steps. Ensure that all people know the duties they are to perform. Make sure everyone goes from “meeting” to “doing.”
- Conclude by summarizing the group’s accomplishments.
- Thank group members sincerely for their participation and contributions.

### Follow up (action items).

- Evaluate the meeting. What worked? What needs improvement?
- Plan post-meeting logistics.
- Use the minutes and your impressions to create a document that clearly describes the meeting.
- Use comments, questions, criticisms, and insights to enhance the quality of the document.
- Distribute the document to all participants and other essential players within the organization.
- Monitor progress on next steps.

## Steps to Effective Meetings

# STEP 1 – CREATE AN AGENDA THAT IS CAREFULLY SCRIPTED

- Give start and stop times. Time is money; plan wisely!
- Identify the place of the meeting.
- List participants and guests.
- List the participants' roles and what you expect from them. This will allow them to gather all the relevant data they need to bring to the meeting.
- Prepare a structured discussion to frame the purpose, topics, and direction of the meeting.
- Deliver the agenda in advance so the participants have time to plan and prepare for the meeting.
- Make every meeting a learning event. Incorporate creative and cutting-edge education on your particular topic by using books, speakers, or videos. The people attending are giving up their time for you; you need to give something back to them.
- Use a variety of tools and activities to make the meeting productive and fun. Get them charged up!



## Steps to Effective Meetings

# STEP 2—SET UP THE MEETING PLACE

- Select a physical setting that is comfortable and big enough, and that suits the needs of your meeting.
- Create a warm and attractive atmosphere conducive to interaction.
- Provide appropriate refreshments.
- Have appropriate visual aids and learning aids on hand.
- Always do something a little different and something new. Make them glad they came.

**Steps to Effective Meetings**  
**STEP 3—ASSIGN A NOTE  
TAKER (MINUTES)**

- Who attended
- What problems were discussed
- Key decisions reached
- Next steps (action items)
- Who needs to accomplish a task—list team and outside members
- Start and end date of task
- What exactly needs to be accomplished

## Steps to Effective Meetings

# STEP 4—START THE MEETING

- Communicate the purpose and desired outcomes to all participants.
- Clarify the type of participation and interaction desired.
- Set the ground rules.
- Determine when the meeting will end.
- Establish how each member will be heard.
- Set how conflict will be resolved.
- Determine what is expected of each member.
- Decide how confidential topics are handled.
- Show participants that you value their ideas, opinions, and questions.

## Steps to Effective Meetings

# STEP 5—CONDUCT THE MEETING

- Take time to tell and hear stories. Be creative in how you share them.
- Clarify and paraphrase key ideas.
- Ask for different points of view; protect new ideas.
- Use brainstorming techniques:
  - Record ideas and notes on a flip chart.
  - Use bright colors and bold shapes.
  - Use pictures as well as text.
  - Use bullets to emphasize key points.
  - Use no more than seven words per line and seven lines per chart.
  - Keep all flip charts posted so you can refer to them.
  - At the end of the meeting, give them to the note taker so they can be incorporated into the minutes.
- Ask open-ended questions to encourage participation and input.
- Keep the focus on ideas, not on people.
- Assign next steps throughout the meeting. Make all next steps specific assignments.
- Stay focused on the agenda topics. Don't wander off topic or become distracted. Agendas are worth taking seriously, but do not stifle creativity or insult participants who stray.

**Steps to Effective Meetings**  
**STEP 6—KEEP THE MEETING  
FOCUSED AND MOVING**

- Get information and data from the meeting. Ensure that people are heard.
- Let the people carry the content; you guide the process.
- Acknowledge and reinforce constructive contributions.
- Use the agenda to stay on track.
- Vary the pace: speed up, slow down, take breaks, and change tacks.
- Keep the group aware of where they are in the process.
- Periodically summarize important points and ask for agreement.
- Help the group reach consensus and reach conclusions.

**Steps to Effective Meetings****STEP 7—CLOSING THE MEETING**

- Help the group decide on next steps.
- Review assigned next steps. Ensure that all people know the duties they are to perform. Make sure everyone goes from “meeting” to “doing.”
- Conclude by summarizing the group’s accomplishments.
- Thank group members sincerely for their participation and contributions.

**Steps to Effective Meetings**  
**STEP 8—FOLLOW UP (ACTION ITEMS)**

- Evaluate the meeting. What worked? What needs improvement?
- Plan post-meeting logistics.
- Use the minutes and your impressions to create a document that clearly describes the meeting.
- Use comments, questions, criticisms, and insights to enhance the quality of the document.
- Distribute the document to all participants and other essential players within the organization.
- Monitor progress on next steps.

# MEETING MONSTERS

1. Meeting Monster: Overly Talkative  
What to do:
  
2. Meeting Monster: Highly Argumentative  
What to do:
  
3. Meeting Monster: Rambler  
What to do:
  
4. Meeting Monster: Obstinate/Rigid  
What to do:
  
5. Meeting Monster: Griper/Whiner  
What to do:



## **MEETING MONSTERS (CONTINUED)**

6. Meeting Monster: Side Conversation  
What to do:

7. Meeting Monster: Definitely Wrong  
What to do:

8. Meeting Monster: Off the Subject  
What to do:

9. Meeting Monster: Silent  
What to do:

Reprinted from Parker, Glenn M., and Richard P. Kropp, Jr. 1994.  
*50 Activities for Self-Directed Teams*. Human Resource Development Press.

## HOW TO DEAL WITH MEETING MONSTERS

**Overly talkative.** Interrupt with, “That’s an interesting point. Now let’s see what the rest of the team thinks.”

**Highly argumentative.** Honestly try to find the merit in the highly argumentative person’s statements. Try humor: “I respect your right to be wrong.” Try sarcasm: “I hate people who beat around the bush.”

**Rambler.** Say quietly, “Your point is interesting, but we need to move on to the next agenda item.”

**Obstinate/rigid.** Throw the obstinate or rigid person’s point to the team for consideration. Say that time is short and ask that the group’s viewpoint be accepted for the moment. Say you’ll be glad to discuss it later.

**Griper/whiner.** Point out that organizational policy cannot be changed at the meeting, “So let’s try to figure out how we can best operate under the present system.”

**Side conversation.** Call one of them by name, restate the most recent opinion, and ask for the converser’s opinion. Refer to your team norms about no side conversations.

**Definitely wrong.** Try saying, “That’s one way to look at it,” or “I see your point, but did you know that . . . ?”

**Off the subject.** Try, “Something I said may have led you to think we are discussing \_\_\_\_\_, but right now we are considering \_\_\_\_\_.”

**Silent.** Ask the person next to the silent person a question and then ask the silent person to comment on the answer. If the silent person is near you, ask the silent person’s opinion on a subject that you are sure the silent person knows a great deal about.

Reprinted from Parker, Glenn M., and Richard P. Kropp, Jr. 1994.  
*50 Activities for Self-Directed Teams*. Human Resource Development Press.

# WORKSHOP LESSON PLAN COMMUNICATION

## Description

This session introduces high school students to the role of communication in leadership.

## Learning Objectives

After completing this session, the student should know:

- Basic principles of communication
- The role of good communication in leadership
- Various techniques of effective communication

## Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Ten overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of three handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy of “Communications Games” for one student, and one copy of each of the other two handouts for each student)

## Session Time Required

Approximately 50 minutes

## Introduction

**“No one would talk much in society if they knew how often they misunderstood others.”**

—Johann Wolfgang von Goethe

Many problems occur in groups and organizations because of people’s failure to communicate effectively. Faulty communication can cause confusion and misunderstanding and can even contribute to the failure of otherwise good plans. Effective communication occurs when the person receiving a message understands it as intended by the sender. A strong leader is able to communicate effectively.

## Communications Game

Ask students for a volunteer who is willing to give directions to the group. Give the volunteer a copy of the “Communications Game” drawing from Handouts/Overheads at the end of this lesson plan and instruct the volunteer not to let the other students see it. After studying it, the volunteer should be ready to give the other students instructions on how to draw the picture. Ask the rest of the group to take out a piece of blank paper and a pencil or pen. Say the following:

“Let’s try a communication exercise.

“What we are going to do is try to follow instructions given by (volunteer’s name) as he/she tells you how to duplicate the drawing he/she is holding. Listen carefully because you may not ask any questions. The only one who can talk is (volunteer’s name). Does everyone understand?”

The volunteer then describes how to draw the picture while the other students try to duplicate it. When they are finished, let some of the students show their drawings. Then compare them to the original as shown on the “Communications Game” overhead.

Point out that we purposely have hampered communication by not allowing visual aids and by stopping all feedback from the students to the volunteer.

Ask the students, “How could we have improved communication during the game?” Write their suggestions on a flip chart for all to see.

## Communication Process

(Display the “Communication Process” overhead from Handouts/Overheads at the end of this lesson

plan and distribute the “Communication Process” handout.)

**Idea.** First, a person has a message in mind and wants to send it to others. That message can be a concept, an idea, information, or feelings.

**Encoding.** A person then sends a message to someone using speech, writing, or other methods or symbols.

**Decoding.** The person receiving the message then translates the words or symbols into a concept or information.

When a message is sent, two things affect how it is understood:

- **Content.** The actual words used—spoken or written—may be interpreted differently by the person receiving a message from what the sender intended. Even the simplest message can be misunderstood. (Example: “Be home early tonight.”) And many words have different meanings, which confuses the issue even more.
- **Context.** Other factors—tone of voice, the look in the sender’s eyes, hand gestures—can influence how a message is understood. These nonverbal influences are known as “paralanguage.”

Sometimes, paralanguage causes misunderstanding. (Example: Someone says, “I’m sorry,” but his facial expression and body language say otherwise.) Listeners sometimes are more influenced by the body language of a speaker than by what the speaker actually says.

Many leaders do not realize the importance of making sure their messages are understood; they think telling someone to do something is enough. Effective group leaders make certain their messages are understood.

How can leaders be certain their messages are understood? One way is to ask questions of the people receiving the message to make certain they understand it. This two-way communication process is known as “feedback.”

This feedback will show that the person receiving the message understood its importance and what must be done with it. Remember that effective communication should be an exchange of information between two or more people, NOT just a one-way sending of a message.

**“Nothing is so simple that it cannot be misunderstood.”**

—Jr. Teague

(Display the “Barriers to Communication” overhead from Handouts/Overheads at the end of this lesson plan.)

## Communication Barriers

It is important to recognize that many things get in the way of effective communication. These barriers can be physical (static on a telephone line) or psychological (the listener doesn’t like the person speaking). Some of the more important barriers are listed below.

**Culture, background, and bias.** Our experiences influence how we understand a message. This can be good, as when we use what we have learned in our culture or from our background to understand something new. But sometimes our previous experiences can bias how we understand what someone is trying to tell us. Then these factors can become barriers to effective communication.

**Noise.** Sometimes communication equipment itself presents barriers to communication (e.g., static on phone lines, cable lines down during storms, speaker systems that fail or crackle at concerts). Someone else talking to you in class while the teacher is talking is a barrier to your understanding what the teacher is saying. For effective communication, the sender and the receiver must both be able to concentrate on the messages being sent to each other.

**Focusing on ourselves.** Another thing that can interfere with good communication is our tendency to focus on ourselves during communication. Instead of trying to understand what the other person is saying, we may get defensive, try to show our superior knowledge, or make ourselves the center of attention.

**Perception of speaker.** The way a person speaks or our attitude toward the speaker may become a barrier to effective communication. If we feel that the speaker speaks too fast or does not speak fluently or articulate clearly, we may not pay attention. We may accept uncritically what a person we like says, while dismissing what a person we don’t like says.

**Contents of message.** Sometimes the listener will focus upon a particular thing said and lose track of the speaker’s overall message.

**Competing messages.** Bright lights, an attractive person, unusual sights, or any other stimulus provide a potential distraction.

**Stress.** People do not see things the same way when under stress.

These barriers and others can be thought of as filters that prevent the speaker’s message from getting through to the listener. Two ways of overcoming filters are to promote active listening and to seek feedback.

(Display the “Active Listening” overhead from the end of this session.)

## Active Listening

Effective communication requires that people receiving a message do more than hear it; they must also concentrate on trying to understand it.

Researchers call this “active listening.” The opposite of this is “passive listening.” This occurs when the person merely hears the message, but has little motivation to try to understand or retain it. An example of passive listening would be when students in a classroom are “listening” to instructions from the teacher, but don’t really pay attention. That’s why the teacher often has to repeat the instructions several times. Another example occurs during introductions to strangers. We don’t remember the person’s name five minutes later because we weren’t really paying close attention.

Since only a part of our mind is paying attention, it is easy to go into “mind drift,” thinking about other things while listening to someone. The cure for this is active listening, which involves listening with a purpose. It requires that the listener concentrate on the words and the feelings of the sender in order to understand. The following are a few ways to be an active listener:

- Spend more time listening than talking.
- Do not finish the sentences of others.
- Do not answer questions with questions.
- Be aware of biases. (We all have them—we need to control them.)

- Never daydream or become preoccupied with your own thoughts when others talk.
- Let the other speaker talk; do not dominate the conversation.
- Plan responses after the other person has finished speaking—NOT while the other person is speaking.
- Provide feedback, but do not interrupt too many times.
- Consider all the relevant factors, ask open-ended questions, then summarize your response to the speaker's message.
- Keep the conversation on what the speaker says—NOT on what interests you.
- Take brief notes. (This helps you concentrate on what is being said.)

**“When you know something, say what you know. When you don't know something, say that you don't know. That is knowledge.”**

—Confucius

(Display the “Feedback” overhead from Handouts/Overheads at the end of this lesson plan.)

## Feedback

Speakers use feedback from those listening to make sure their message has been understood. When the listener indicates confusion through questions, responses, or perhaps a puzzled look, the speaker can alter the message by simplifying it, saying it a different way, or giving an example.

Asking listeners to restate what you just said in their own words will help you know whether they really understood what you meant.

In our daily conversations, we often provide feedback to one another.

1. **Evaluative.** Making a judgment about the worth, goodness, or appropriateness of the other person's statement.
2. **Interpretive.** Paraphrasing—attempting to explain what the other person's statement means.
3. **Supportive.** Attempting to assist or bolster the other communicator.
4. **Probing.** Attempting to gain additional information, continue the discussion, or clarify a point.

5. **Understanding.** Attempting to discover completely what the other communicator means by the statements.

Imagine how much better daily communications would be if listeners tried to understand first, before they tried to evaluate what someone is saying.

**“Without knowing the force of words, it is impossible to know men.”**

—Confucius

(Display the “Nonverbal Communication” overhead from Handouts/Overheads at the end of this lesson plan.)

## Nonverbal Communication

To deliver the full impact of a message, use nonverbal behaviors to improve interpersonal communication.

**Eye contact.** This helps regulate the flow of communication. It signals interest in others and increases the speaker's credibility. People who make eye contact open the flow of communication and convey interest, concern, warmth, and credibility.

**Facial expressions.** Smiling is a powerful cue that transmits happiness, friendliness, warmth, and liking. So if you smile frequently, you will be perceived as more likable, friendly, warm, and approachable. Smiling is often contagious, and people will react favorably. They will be more comfortable around you and will want to listen more.

**Gestures.** If you fail to gesture while speaking, you may be perceived as boring and stiff. A lively speaking style captures the listener's attention, makes the conversation more interesting, and facilitates understanding.

**Posture and body orientation.** You communicate numerous messages by the way you talk and move. Standing erect and leaning forward communicates to listeners that you are approachable, receptive, and friendly. Good interpersonal communication results when you and the listener face each other. Speaking with your back turned or looking at the floor or ceiling should be avoided, as it communicates disinterest.

**Proximity.** Cultural norms dictate a comfortable distance for interaction with others. You should look for signals of discomfort caused by invading

the other person's space. Some of these are rocking, leg swinging, tapping, and gaze aversion.

**Vocal.** Speaking can signal nonverbal communication when you include such vocal elements as tone, pitch, rhythm, timbre, loudness, and inflection. For maximum teaching effectiveness, learn to vary these six elements of your voice. One of the major criticisms of many speakers is that they speak in a monotone voice. Listeners perceive this type of speaker as boring and dull.

**“Speak comfortable words!”**

—William Shakespeare

(Display the “Speaking Hints” overhead from Handouts/Overheads at the end of this lesson plan.)

## Speaking Hints

When speaking or trying to explain something, ask the listeners if they are following you.

Ensure that the receiver has a chance to comment or ask questions.

Try to put yourself in the other person's shoes; consider the feelings of the receiver.

Be clear about what you say.

Look at the receiver.

Make sure your words match your tone and body language.

Vary your tone and pace.

Do not be vague, but on the other hand, do not complicate what you are saying with too much detail.

Do not ignore signs of confusion among your listeners.

(Display the “Presentation Skills” overhead from Handouts/Overheads at the end of this lesson plan and distribute the “Presentation Skills” handout.)

## Presentation Skills

Eleanor Roosevelt was a shy young girl who was terrified at the thought of speaking in public. But with each passing year, she grew in confidence and self-esteem. She once said, “No one can make you feel inferior, unless you agree with it.”

Presentations are a way of communicating ideas and information to a group. A good presentation has the following:

**Content.** Your presentation should contain information people need. Unlike written reports (which can be read and re-read), a presentation must take into account how much information the audience can absorb in one sitting.

**Structure.** Your presentation should have a logical beginning, middle, and end. It must be sequenced and paced so the audience can understand it. In an oral presentation, the presenter must be careful not to lose the audience by wandering from the main point of the presentation.

**Packaging.** It must be well-prepared. A report can be re-read and portions skipped over, but the audience is at the mercy of a presenter. The audience doesn't have a remote to fast-forward through the boring part of a presentation.

**Human element.** A good presentation will be remembered much more than a good report because of the personality of the person who made the presentation.

**The voice.** The voice is probably the most valuable tool of the presenter. It carries most of the content that the audience takes away. One of the oddities of speech is that we can easily tell others what is wrong with their voice, e.g., too fast, too high, too soft, etc., but we have trouble listening to and changing our own voices.

**The body.** Your body communicates different impressions to the audience. People not only listen to you, they also watch you. Slouching tells them you are indifferent or you do not care—even though you may care a great deal! On the other hand, displaying good posture tells your audience that you know what you are doing, and that you care deeply about it. Also, good posture helps you speak more clearly and effectively.

## Questions

Although some people get a perverse pleasure from putting others on the spot, and some try to look good in front of the boss, most people ask questions from a genuine interest. Questions do not necessarily mean you did not explain the topic well enough, but that the audience's interest is deeper than average.

Always allow time at the end of the presentation for questions. After inviting questions, do not rush

ahead if no one asks a question. Pause for about six seconds to allow the audience to gather their thoughts. When answering, direct your remarks to the entire audience. That way, you keep everyone focused, not just the questioner. To reinforce your presentation, try to relate the question back to the main points.

Make sure you listen to the question being asked. If you do not understand it, ask the speaker to clarify. Pause to think about the question, otherwise the answer you give may be correct, but ignore the main issue. If you do not know the answer, be honest; do not waffle. Tell them you will get back to them . . . and make sure you do!

Answers that last 10 to 40 seconds work best. If they are too short, they seem abrupt, while longer answers appear too elaborate. Also, be sure to keep on track. Do not let off-the-wall questions sidetrack you into areas that are not relevant to the presentation.

If someone takes issue with something you said, try to find a way to agree with part of the speaker's argument. For example, "Yes, I understand your position . . ." or, "I'm glad you raised that point, but . . ." The idea is to praise their point and agree with them. Audiences sometimes tend to think of "us versus you." You do not want to risk alienating them.

(Display the "Preparing the Presentation" overhead from Handouts/Overheads at the end of this lesson plan.)

## Preparing Presentations

**"To fail to prepare is to prepare to fail."**

—Proverb

A good presentation starts out with introductions and an icebreaker such as a story, an interesting statement or fact, a joke, a quotation, or an activity to get the group warmed up. The introduction also needs an objective or goal. It informs the audience of the purpose of the presentation.

Next comes the body of the presentation. Do NOT write it out word for word. All you want is an outline. By jotting down the main points on a set of index cards, you not only have your outline, but also a memory jogger for the actual presentation. To prepare the presentation, ask yourself the following:

- What is the purpose of the presentation?
- Who will be attending?
- What does the audience already know about the subject?
- What is the audience's attitude toward me (e.g., hostile, friendly, etc.)?

A 45-minute talk should have no more than about seven main points. This may not seem like very many, but if you are to leave the audience with a clear picture of what you have said, you cannot expect them to remember much more than that.

There are several options for structuring the presentation.

**Time line.** Arranged in chronological order.

**Climax.** The main points are delivered in order of increasing importance.

**Problem/solution.** A problem is presented, a solution is suggested, and benefits of the solution are then given.

**Classification.** The important items are the major points.

**Simple to complex.** Ideas are listed from the simplest to the most complex. Can also be done in reverse order.

You will probably want to include some visual information to help the audience understand your presentation:

- Develop charts, graphs, slides, handouts, etc.
- After the body comes the closing. This is where you ask for questions, provide a wrap-up (summary), and thank the participants for attending.
- Notice that you told them what they are about to hear (the objective), told them (the body), and told them what they heard (the wrap-up).

And finally, the important part: *practice, practice, practice*. The main purpose of creating an outline is to develop a coherent plan of what you want to talk about. You should know your presentation so well that during the actual presentation, you should only have to briefly glance at your notes to ensure you are staying on track. This will also help you with your nerves by giving you the confidence that you can do it.



Your practice should include a dry run in front of co-workers, family, or friends. They can be valuable at providing feedback, and you get a chance to practice controlling your nerves. Another great feedback technique is to make a video or audiotape of your presentation and review it critically with a colleague.

(Display the “Tips and Techniques for Great Presentations” overhead from Handouts/Overheads at the end of this lesson plan.)

## Tips and Techniques

If you have handouts, do not read straight from them. The audience does not know if they should read along with you or listen to you read.

Do not put both hands in your pockets for long periods of time. This tends to make you look unprofessional. It is OK to put one hand in a pocket, but ensure there is no loose change or keys to jingle around. This will distract the listeners.

Do not wave a pointer around in the air like a wild knight brandishing a sword to slay a dragon. Use the pointer for what it is intended and then put it down, otherwise the audience will become fixated upon your “sword,” instead of upon you.

Do not lean on the podium for long periods. The audience will begin to wonder when you are going to fall over.

Speak to the audience—NOT to the visual aids, such as flip charts or overheads. Also, do not stand between the visual aid and the audience.

Speak clearly and loudly enough for all to hear. Do not speak in a monotone voice. Use inflection to emphasize your main points.

A disadvantage of presentations is that people cannot see the punctuation the way they can in a text, and this can lead to misunderstandings. An effective way of overcoming this problem is to pause at the times when there would normally be punctuation marks.

Use colored backgrounds (such as yellow) on overhead transparencies and slides, as the bright white light emitted by overhead projectors can be harsh on the eyes and will quickly cause your audience to tire. If all your transparencies or slides have clear backgrounds, then tape one blank yellow one on the

overhead face. For slides, use a rubber band to hold a piece of colored cellophane over the projector lens.

Learn the name of each participant as quickly as possible. Based upon the atmosphere you want to create, call them by their first names or by using a title such as Mr., Mrs., Miss, or Ms.

Tell them what name and title you prefer them to use when addressing you.

Listen intently to comments and opinions. By adding your ideas to audience comments rather than dismissing their remarks, the audience will feel that their ideas, comments, and opinions are worthwhile.

Circulate around the room as you speak. Moving closer to the audience in this way increases rapport.

Vary your techniques (lecture, discussion, debate, films, slides, reading, etc.).

Get to the presentation before your audience arrives and be the last to leave.

Be prepared to use an alternate approach if the one you’ve chosen seems to bog down. You should be confident enough with your own material so the audience’s interests and concerns, not the presentation outline, determine the format. Use your background, experience, and knowledge to relate your subject matter to the audience’s interests and concerns.

When writing on flip charts, use no more than seven lines of text per page and no more than seven words per line. Also, use bright and bold colors, and use pictures as well as text.

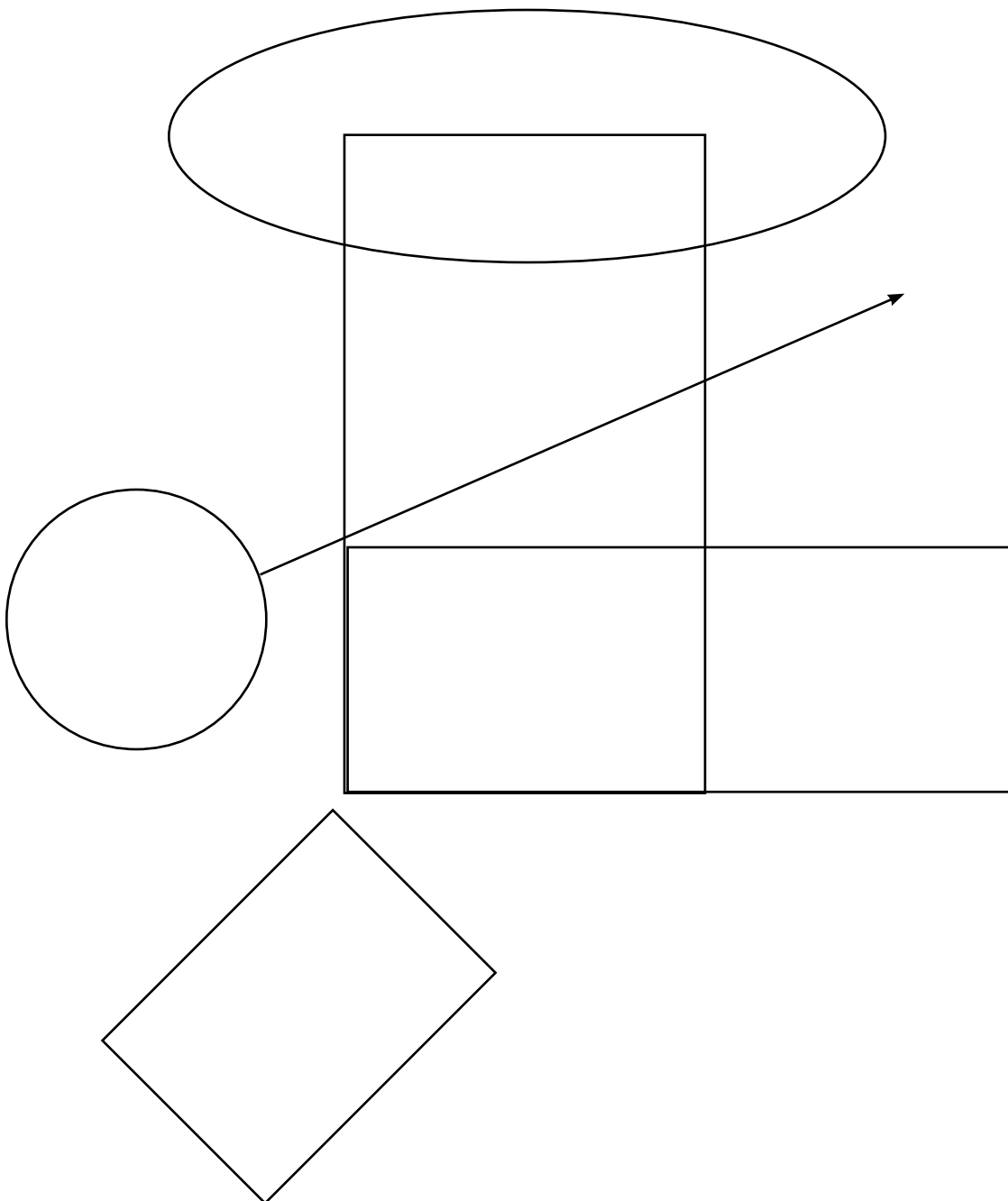
Consider the time of day and how long you have for your talk. Time of day can affect the audience. After lunch is known as the graveyard section in training circles, because at that time audiences will feel more like a nap than listening to a talk.

Most people find that if they practice in their head, the actual talk will take about 25 percent longer than the practice session. Using a flip chart or other visual aids also adds to the time. Remember—it is better to finish slightly early than to overrun.

## **Closing**

You can hone your communications skills by joining a speaking group such as the Toastmasters, the Key Club, etc.

# COMMUNICATIONS GAME



## COMMUNICATION PROCESS

**Idea.** First, information exists in the mind of the sender. This can be a concept, idea, information, or feelings.

**Encoding.** Next, a message is sent to a receiver in words or other symbols.

**Decoding.** The receiver then translates the words or symbols into a concept or information.

When a message is sent, two things affect how it is understood:

- **Content:** the actual words or symbols of the message
- **Context:** the way the message is delivered

A message has NOT been communicated unless the receiver understands it. How do you know it has been properly received?  
By two-way communication or feedback.

**“Nothing is so simple that it cannot be misunderstood.”**

—Jr. Teague

## COMMUNICATION PROCESS

**Idea.** First, a person has a message in mind and wants to send it to others. That message can be a concept, idea, information, or feelings.

**Encoding.** A person then sends a message to someone using speech, writing, or other methods or symbols.

**Decoding.** The person receiving the message then translates the words or symbols into a concept or information.

When a message is sent, two things affect how it is understood:

- **Content.** The actual words used—spoken or written—may be interpreted differently by the person receiving a message from what the sender intended. Even the simplest message can be misunderstood. (For example, “Be home early tonight.”) And many words have different meanings, which confuses the issue even more.
- **Context.** Other factors—tone of voice, the look in the sender’s eyes, hand gestures—can influence how a message is understood. These nonverbal influences are known as “paralanguage.”

Sometimes paralanguage causes misunderstanding. (For example, someone says “I’m sorry,” but his facial expression and body language say otherwise.) Listeners sometimes are more influenced by the body language of a speaker than by what the speaker actually says.

Many leaders do not realize the importance of making sure their messages are understood; they think telling someone to do something is enough. Effective group leaders make certain their messages are understood.

How can leaders be certain their messages are understood? One way is to ask questions of the people receiving the messages to make certain they understand them. This two-way communication process is known as “feedback.”

This feedback will show that the person receiving the message understood its importance and what must be done with it. Remember that effective communication should be an exchange of information between two or more people, NOT just a one-way sending of a message.

**“Nothing is so simple that it cannot be misunderstood.”**

—Jr. Teague

## BARRIERS TO COMMUNICATION

**Culture, background, and bias.** We allow our past experiences to influence how we interpret the message.

**Noise.** Equipment or environmental noise impedes clear communication.

**Focusing on ourselves.** Focusing on ourselves rather than the other person can lead to confusion and conflict.

**Perception of speaker.** If we feel the person is talking too fast, not fluently, does not articulate clearly, etc., we may dismiss the person.

**Contents of message.** Sometimes a listener will focus upon a particular thing said and lose track of the speaker's overall message.

**Competing messages.** Bright lights, an attractive person, unusual sights, or any other stimulus provide a potential distraction.

**Stress.** People do not see things the same way when under stress.

## ACTIVE LISTENING

Listening can be our most powerful communication tool! Be sure to use it!

Hearing and listening are not the same things. Hearing is the act of perceiving sound. Listening is a selective activity that involves the reception and the interpretation of aural stimuli.

Listening is divided into two main categories: passive and active. Passive listening is little more than hearing.

Active listening requires that the listener attend to the words and the feelings of the sender for understanding.

The following are a few ways to be an active listener:

- Spend more time listening than talking.
- Do not finish the sentences of others.
- Do not answer questions with questions.
- Be aware of biases. (We all have them—we need to control them.)
- Never daydream or become preoccupied with your own thoughts when others talk.
- Let the other speaker talk; do not dominate the conversation.
- Plan responses after the other person has finished speaking—NOT while the other person is speaking.

## ACTIVE LISTENING (CONTINUED)

- Provide feedback, but do not interrupt too many times.
- Consider all the relevant factors, ask open-ended questions, then summarize your response to the speaker's message.
- Keep the conversation on what the speaker says—NOT on what interests you.
- Take brief notes. (This helps the listeners concentrate on what is being said.)

**“When you know something, say what you know. When you don't know something, say that you don't know. That is knowledge.”**

—Confucius



## FEEDBACK

The purpose of feedback is to change and alter messages so the second communicator understands the intention of the original communicator. It includes verbal and nonverbal responses to another person's message.

Providing feedback is accomplished by paraphrasing the words of the sender. Restate the sender's feelings or ideas in your own words, rather than repeating their words.

Carl Roger listed five main categories of feedback. They are listed in the order in which they most frequently occur in daily conversations. Notice that we make judgments more often than we try to understand.

1. **Evaluative.** Making a judgment about the worth, goodness, or appropriateness of the other person's statement.
2. **Interpretive.** Paraphrasing—attempting to explain what the other person's statement means.
3. **Supportive.** Attempting to assist or bolster the other communicator.
4. **Probing.** Attempting to gain additional information, continue the discussion, or clarify a point.
5. **Understanding.** Attempting to discover completely what the other communicator means by the statements.

Imagine how much better daily communications would be if listeners tried to understand first, before they tried to evaluate what someone is saying.

**“Without knowing the force of words, it is impossible to know men.”**

—Confucius

## NONVERBAL COMMUNICATION

To deliver the full impact of a message, use nonverbal behaviors to improve communication.

**Eye contact.** People who make eye contact open the flow of communication and convey interest, concern, warmth, and credibility.

**Facial expressions.** Smiling is a powerful cue that transmits happiness, friendliness, warmth, and liking.

**Gestures.** A lively speaking style captures the listener's attention, makes the conversation more interesting, and facilitates understanding.

**Posture and body orientation.** You communicate numerous messages by the way you talk and move. Standing erect and leaning forward communicates to listeners that you are approachable, receptive, and friendly. Good interpersonal communication results when you and the listener face each other. Speaking with your back turned or looking at the floor or ceiling should be avoided, as it communicates disinterest.

**Proximity.** Cultural norms dictate a comfortable distance for interaction with others. You should look for signals of discomfort caused by invading the other person's space.

**Vocal.** Speaking can signal nonverbal communication when you include such vocal elements as tone, pitch, rhythm, timbre, loudness, and inflection.

**“Speak comfortable words!”**

—William Shakespeare

## SPEAKING HINTS

When speaking or trying to explain something, ask the listeners if they are following you.

Ensure that the receiver has a chance to comment or ask questions.

Try to put yourself in the other person's shoes; consider the feelings of the receiver.

Be clear about what you say.

Look at the receiver.

Make sure your words match your tone and body language (nonverbal behavior).

Vary your tone and pace.

Do not be vague, but on the other hand, do not complicate what you are saying with too much detail.

Do not ignore signs of confusion.

## PRESENTATION SKILLS

Presentations are a way of communicating ideas and information to a group.

A good presentation has:

**Content.** It contains information people need.

**Structure.** It has a logical beginning, middle, and end. It must be sequenced and paced so the audience can understand it.

**Packaging.** It must be well-prepared.

**Human element.** A good presentation will be remembered much more than a good report because it has a person attached to it.

## PRESENTATION SKILLS

Eleanor Roosevelt was a shy young girl who was terrified at the thought of speaking in public. But with each passing year, she grew in confidence and self-esteem. She once said, “No one can make you feel inferior, unless you agree with it.”

Presentations are a way of communicating ideas and information to a group. A good presentation has the following:

**Content.** Your presentation should contain information people need. Unlike written reports (which can be read and re-read), a presentation must take into account how much information the audience can absorb in one sitting.

**Structure.** Your presentation should have a logical beginning, middle, and end. It must be sequenced and paced so the audience can understand it. In an oral presentation, the presenter must be careful not to lose the audience by wandering from the main point of the presentation.

**Packaging.** It must be well-prepared. A report can be re-read and portions skipped over, but the audience is at the mercy of a presenter. The audience doesn't have a remote to fast-forward through the boring part of a presentation.

**Human element.** A good presentation will be remembered much more than a good report because of the personality of the person who made the presentation.

**The voice.** The voice is probably the most valuable tool of the presenter. It carries most of the content that the audience takes away. One of the oddities of speech is that we can easily tell others what is wrong with their voice, e.g., too fast, too high, too soft, etc., but we have trouble listening to and changing our own voices.

**The body.** Your body communicates different impressions to the audience. People not only listen to you, they also watch you. Slouching tells them you are indifferent or you do not care—even though you may care a great deal! On the other hand, displaying good posture tells your audience that you know what you are doing, and that you care deeply about it. Also, good posture helps you speak more clearly and effectively.

## PREPARING THE PRESENTATION

**“To fail to prepare is to prepare to fail.”**

—Proverb

To prepare the presentation, ask yourself the following:

- What is the purpose of the presentation?
- Who will be attending?
- What does the audience already know about the subject?
- What is the audience’s attitude toward me (e.g., hostile, friendly, etc.)?

A 45-minute talk should have no more than about seven main points.

There are several options for structuring the presentation:

**Time line.** Arranged in chronological order.

**Climax.** The main points are delivered in order of increasing importance.

**Problem/solution.** A problem is presented, a solution is suggested, and benefits of the solution are then given.

**Classification.** The important items are the major points.

**Simple to complex.** Ideas are listed from the simplest to the most complex. Can also be done in reverse order.

## PREPARING THE PRESENTATION (CONTINUED)

You will probably want to include some visual information to help the audience understand your presentation:

- Develop charts, graphs, slides, handouts, etc.
- After the body comes the closing. This is where you ask for questions, provide a wrap-up (summary), and thank the participants for attending.
- Notice that you told them what they are about to hear (the objective), told them (the body), and told them what they heard (the wrap-up).

And finally, the important part—*practice, practice, practice*. Your practice session should include a dry run in front of co-workers, family, or friends. They can be valuable for providing feedback, and you get a chance to practice controlling your nerves. Another great feedback technique is to make a video or audiotape of your presentation and review it critically with a colleague.

## TIPS AND TECHNIQUES FOR GREAT PRESENTATIONS

If you have handouts, do not read straight from them. The audience does not know if they should read along with you or listen to you read.

Do not put both hands in your pockets for long periods of time.

Do not wave a pointer around in the air like a knight brandishing a sword to slay a dragon.

Do not lean on the podium for long periods.

Speak to the audience—NOT to the visual aids.

Speak clearly and loudly enough for all to hear.

Use colored backgrounds on overhead transparencies and slides.

Learn the name of each participant as quickly as possible.

Circulate around the room as you speak.

Vary your techniques (lecture, discussion, debate, films, slides, reading, etc.).

Get to the presentation before your audience arrives and be the last one to leave.

You should be confident enough with your own material that the audience's interests and concerns determine the format.

When writing on flip charts, use no more than seven lines of text per page and no more than seven words per line. Also, use bright and bold colors, and pictures as well as text.

Consider the time of day and how long you have for your talk. Time of day can affect the audience.

Most people find that if they practice in their head, the actual talk will take about 25 percent longer than the practice session. Using a flip chart or other visual aids also adds to the time. Remember—it is better to finish slightly early than to overrun.



# WORKSHOP LESSON PLAN

## DECISION MAKING

### Description

This session introduces decision-making skills.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of decision making
- The role of decision making in leadership
- Various successful techniques for making decisions

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Four overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of two handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Defining “Decisions”

Have students brainstorm to find a definition for the word decision (the process of selecting one or more alternatives from a number of choices). Write their answers on a flip chart or chalkboard.

Typical answers may include:

- Conclusions or judgments about an issue or matter.
- Making a choice between two or more alternatives.

What is a decision? A decision is the process of selecting one or more alternatives from a number of choices.

Everyone makes a multitude of decisions every day. Many of these decisions require little thought and might even be called habits rather than decisions. However, all of us will also make many important decisions that will affect the quality of our lives. Problems are part of human existence, and problem solving is a skill everyone must acquire. It is, therefore, crucial to examine the way decisions are made.

In a democratic society, individuals have the right to make choices in many aspects of their lives. Their choices may affect others. When you make decisions, you must consider not only your own feelings, preferences, and goals, but also those of others.

## Responsible Decisions

(Display the “Responsible Decisions” overhead from Handouts/Overheads at the end of this lesson plan.)

Have the students discuss the questions below.

What is a good or responsible decision?

- One that is legal
- One that helps me grow
- One that solves a real problem
- One that doesn’t hurt others

Why is it important to know how to make good, responsible decisions?

- It makes us better people.
- It makes others respect us.
- It helps get the job done.

How do you feel when you make a good, responsible decision? Why do you feel this way?

- Satisfied
- That I have the best solution
- Good

(Display the “What Is Your Experience?” overhead from Handouts/Overheads at the end of this lesson plan.)

Have each student write down the following:

- A recent decision he or she made
- A recent decision made for him or her by another person
- A decision made jointly with another person or a group of people

Have the students form small groups to discuss what they wrote in their notebooks. Then ask them to discuss the following questions with reference to what they wrote:

- What kinds of decisions do we make ourselves?
- What kinds of decisions do others make for us?
- Why is it appropriate that some decisions should be made by others? (For example, fire drill procedures that are developed by someone responsible for the safety of everyone in the school.)
- What kinds of decisions are made jointly with another person or a group of people?

(Display the “Today’s Decisions” overhead from Handouts/Overheads at the end of this lesson plan.)

## Decision-Making Process

Have the students list the following in their notebooks:

- Three decisions they made related to the day on which this activity is taking place
- The way each of the three decisions was made
- The consequences of each of the decisions

Have all students select one of the decisions they made and do the following:

- List alternatives to the decision made.
- Select one of the alternatives and list the consequences to the rest of the day had that alternative been chosen.

## Decision-Making Model

(Distribute the “Decision-Making Model” handout from Handouts/Overheads at the end of this lesson plan to each student and present the decision-making model.)

Have students work in small groups and discuss some of the decisions they recorded in their notebooks in the first sample activity.

Ask all students to apply the model outlined on the “Decision-Making Model” handout to one of their own decisions. Observe students to determine if they understand the five steps involved in making a decision. Remind them of the steps in the decision-making model:

1. Identify the problem or situation.
2. Gather all the possible solutions or alternatives.
3. Weigh and evaluate each of those choices.
4. Make the decision and put it into action.
5. Evaluate what happens and how you feel about the results.

Have students discuss how their values, feelings, experience, and knowledge influence their choices.

Have students describe in their notebooks a situation involving a decision they will have to make in the near future, and then use the decision-making model to determine the best decision or choice to make. Have students explain in their notebooks how their choices were based on their values, feelings, experience, and knowledge.

(Display the “Evaluating Decisions” overhead from Handouts/Overheads at the end of this lesson plan.)

Encourage students to ask themselves such questions as the following when evaluating their personal decisions:

- Which of my values are consistent with this particular solution or decision?
- Does my decision actually deal with the situation?
- What is the best possible result of my decision, for me and for others?
- How might other people react to my decision or solution?

- Does my decision recognize the rights of others?
- What might happen if everyone decided to solve this kind of problem the same way?

(Distribute the “Jan’s Indecision” handout from Handouts/Overheads at the end of this lesson plan to each student.)

Have the students apply the first three steps of the decision-making model to the “Jan’s Indecision” scenario.

Ask students to do the following:

- State the nature of the problem or dilemma.
- List possible alternatives.
- Discuss the positive and negative consequences of each alternative.
- Rank the alternatives from best to worst.

Suggest that students share the decision-making model with their parents or guardians and, with them, identify the decisions that their parents or guardians make for them and the decisions they can make for themselves.

## Peer Pressure

Peer pressure affects all individuals throughout their lives. Individuals who have a strong belief in their own worth cope most successfully with peer pressure.

Introduce the topic of peer pressure, using questions like the following:

- Who are your peers?
- Why do you want to feel accepted by them?
- In what kinds of situations—at home, in school, in the community—have you felt peer pressure?

You might share personal examples of peer pressure to show students that peer pressure does not end with adolescence.

Summarize the main points of the discussion on a flip chart for students.

Have students discuss, in small groups, the various tactics and types of peer pressure, both positive and negative, that people, particularly adolescents, use. Then let students share these ideas with the whole class.

Encourage students to discuss peer pressure with their parents or guardians. Suggest that they may want to ask their parents or guardians about the types of pressure they feel at work, in the community, or with friends.

Review what negative peer pressure means to students.

Have students list strategies for saying “no” to negative peer pressure. Encourage students to compare the ideas presented with their own ideas and to add new ones to their own lists.

Discuss the merits of each strategy with the students, ranking each as “excellent,” “good,” “fair,” or “poor.” Record these rankings on the chalkboard beside the strategies and have students record them in their notebooks.

Have students discuss possible consequences of saying “no” to peer pressure, as well as ways of avoiding negative peer pressure. The discussion should include strategies for exerting positive peer pressure.

### **Group Dynamics**

Have students list examples of organized and unorganized groups and group situations, both in school and in the community (e.g., sports teams, clubs, fans at a rock concert). Discuss the ways in which groups and individuals function differently.

For example, everyone on a sports team has a specific task to do so the team will be successful. Ask students whether people sometimes behave differently in group situations than they would as individuals. Talk about mob mentality and ask students the following question: Why do people do things when they are part of a crowd that they would never do if they were on their own?

Have students describe actual negative peer pressure incidents they have experienced or observed and list the strategies that were used or could have been used to resist the peer pressure. Ask students to indicate why these methods were, were not, or could have been successful.

## RESPONSIBLE DECISIONS

What is a good or responsible decision?

Why is it important to know how to make good, responsible decisions?

How do you feel when you make a good, responsible decision? Why do you feel this way?

## **WHAT IS YOUR EXPERIENCE?**

Write down on a sheet of paper:

- A recent decision you have made
- A recent decision made for you by another person
- A decision you made jointly with another person or a group of people

# TODAY'S DECISIONS

## Part 1

Write in your notebook:

- Three decisions made related to today
- The way you made your decisions
- The consequences of each decision

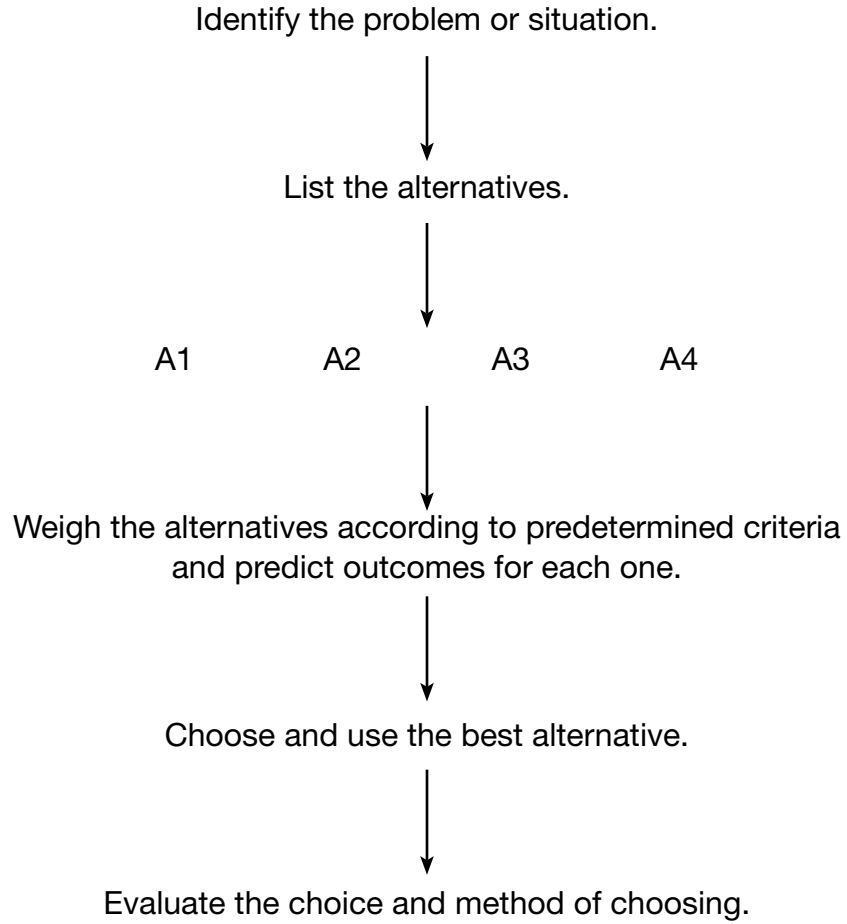
## Part 2

Pick one of the decisions you made.

List alternatives to the decision made.

Select one of the alternatives and list the consequences to the rest of the day had you chosen that alternative.

# DECISION-MAKING MODEL





## EVALUATING DECISIONS

Which of my values are consistent with this particular solution or decision?

Does my decision actually deal with the situation?

What is the best possible result of my decision, for me and for others?

How might other people react to my decision or solution?

Does my decision recognize the rights of others?

What might happen if everyone decided to solve this kind of problem the same way?

## JAN'S INDECISION

Jan had always assumed she would attend the local college, but during her senior year in high school she began to wonder about this plan. Her father had lost his job of 25 years with a local firm, in spite of his training and excellent performance record. That led Jan to question her previously held belief that more education would increase job security. Fortunately, her mother had been able to increase her work hours as a real estate agent to offset some of the family's loss of income. Jan knew their money would be further limited when her father's unemployment compensation payments stopped; he had been unable to find a reasonable job in the local area. She knew college expenses would be a burden to her parents, and her savings would only provide for two semesters of classes.

Finances weren't her only concern. Jan had previously believed that her friend, Cindy, would also be attending college. However, Cindy now planned to enlist in the Army. Cindy liked the idea of the security of military life—her dad was retired from the Army. Jan knew little about military life, and Jan's parents really wanted her to have a college degree. Jan didn't want to be separated from Cindy, even though she was proud that she had received letters of acceptance from both City College and the more distant state university.

Jan's parents were also considering the purchase of a local retail store as a family business, and she knew her parents could use her help. It might be two or more months before that purchase could be finalized, but she could work either full time or after classes, which would really make her parents happy. Jan wasn't sure that college life, without her friend, would make her happy.

Jan now faced choices she had not even thought of earlier. She felt pressured by the time limitations, because college registration was scheduled to take place in less than a month. She did not know if her parents would get the store; it would be a financial risk. Jan silently wished for a crystal ball to foretell the future, or for someone to make her decision, but she was also excited that the choice was hers.

### Points to Ponder

1. Was Jan's initial preference for a college degree really a decision?
2. What information does Jan now have that can help her evaluate this decision?
3. What other information could be useful? What information sources might be consulted?
4. How should Jan handle information that is inconsistent with her previous knowledge or beliefs?
5. Who else is involved in or affected by Jan's decision? How much importance should Jan attach to the consequences they will face?

Case study taken from *Family Life Management*  
by Ann Rice Smith and Suzanne M. Tucker.

# WORKSHOP LESSON PLAN

## GOAL SETTING

### Description

This session introduces goal setting and provides high school students leadership skills they can use in their lives.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of goal setting
- The importance of setting goals
- Various successful goal-setting techniques in management

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Five overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of three handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## What Is a Goal?

“A goal is just a dream with a deadline.”

—Harvey Mackay

“A man without a goal is like a ship without a rudder.”

—Anonymous

Goals provide direction to organizations. They enhance its operation, contribute to group maintenance and development, and give group members a sense of cohesion. The process of setting goals should be tailored to each organization's needs. Some benefit by using a highly structured goal-setting process, while others prefer a more informal process.

Ask the students, “What is a goal?” Write their answers on a flip chart or chalkboard, then read the definitions below.

### Definitions

**Mission.** A statement defining the function and purpose of an organization.

**Goal.** Broad, abstract statement describing an ideal intent, state, or condition.

**Objectives.** Specific statements that describe desired behavior in measurable terms and that describe acceptable standards of performance.

### Advantages

Ask the students, “Why bother to have goals?” Write their answers on a flip chart or chalkboard.

- People work better if they know what the goals of the organization are.
- If people have clear ideas about what they hope to accomplish, their chance of actually doing it increases.
- People will work better if they set the goals for their own jobs.
- Progress can be measured in terms of a goal one is trying to reach.
- People are more comfortable in their jobs when they know how they will be evaluated.
- Goals provide people with a sense of direction and purpose.

- Letting people help set company goals is a good management practice that sets a proper mood for constructive feedback from employees.
- Well-written goals provide for a fair and clear evaluation of performance.

## COMPONENTS OF A GOAL

(Display the “Components of a Goal” overhead and distribute the “Goal Setting” handout reproduced from Handouts/Overheads at the end of this lesson plan.)

A goal is a precise statement of a desired state of affairs that includes the following:

- It is realistic, attainable, and feasible, yet provides challenge and growth.
- It has a target date for completion.
- It has measurable results.
- It is clear, specific, and understandable.
- It is meaningful and relevant.
- It is beneficial.
- It is flexible and has more than one method of attainment.

An organizational goal is identical to an individual goal except that it has these additional components:

- It should be created by all members.
- It should be understandable and acceptable to all members.
- It should be beneficial to all members.

## Goal-Setting Process

(Display the “Goal-Setting Process” overhead reproduced from Handouts/Overheads at the end of this lesson plan.)

The process of setting goals is similar to a problem-solving process. To simplify matters, yet ensure a goal that includes all necessary components, you can set a goal by answering the “five W’s and an H” question. (Who, what, when, where, why, and how?)

- Why? Start by clarifying the needs and purposes of your organization that form the basis for your goals.
- What? List possible goals, then narrow the alternatives to the ones you intend to pursue.

- When? Set realistic time lines for each stage in the process, including planning sessions, work sessions, and actual event.
- Where? Determine locations of events.
- How? Decide how you will implement the selected alternatives.
- Who? Delegate responsibilities equally to all members.

## Planning

Planning is the process of laying out a course of action to achieve a goal. Planning is commonly thought of as little more than tasks, responsibilities, and costs set out on a time schedule; as a list of who is going to do what, when, and at what cost. This is a very important step in goal setting.

(Display the “Goal Planning” overhead reproduced from Handouts/Overheads at the end of this lesson plan.)

Thorough planning takes several steps:

1. **Goal.** What is the overall end result you wish to achieve by executing this plan? Your goal should include the target date for beginning and completion.
2. **Objectives Within the Plan.** Each objective should state a result desired. Distinguish between long-range and short-range objectives.
3. **Assumptions.** What are the factors that may affect your plan as it unfolds? What is the degree of probability that they will?
4. **Resources.** What resources do you need to carry out your plan? Resources include money, people, machines, materials, time, capabilities, experience, energy, etc. Make an inventory of all resources—anyone or anything that is available to you and usable.
5. **Constraints.** What are the limitations within or outside your organization that might affect the achievement of your goal? Constraints may be limitations on resources or outside considerations.

6. **Action Steps/Tasks.** What activities need to be undertaken to achieve the goal of your plan? How long will they take? Who will do them? What resources do you need for each task?
7. **Schedule.** Which tasks must be done first before other tasks can be done? Which tasks can be done at the same time? Have you allowed enough time? Are your deadlines realistic?
8. **Implementation.** Do it!
9. **Evaluation.** What are your milestones? What cross-checks do you need to ensure that tasks are done properly?
10. **Recycling the Planning Process.** Is further planning needed to reach your next goal? Is additional planning needed for a particularly difficult or complicated step of your plan?

## Example of an Action Plan

Below is an example of an action plan.

1. **Goal.** To implement membership recruitment, retention, and involvement.
2. **An Objective.** To develop a committee whose purpose is to increase member involvement by at least 40 percent by next term.
3. **How.** Brainstorm ideas to increase member involvement. Go over this list and weed out all those ideas that are impractical or impossible to do. Discuss this edited list with the executive board. Determine which will be done and delegate the final process of setting up this system to one or two executive officers.
4. **Resources.** Members, executive officers, SOS professional staff members, and ready reference handouts.
5. **Deadlines.** Who: executive board—When: by next term. (Try to set a specific date if possible.)
6. **Results.** Acceptable: Membership involvement increases by 40 percent to 70 percent. Unacceptable: Membership involvement increases by less than 40 percent. Better than expected: Membership involvement increases by more than 70 percent.

## Goal-Setting Tips

Here are some helpful goal-setting tips:

1. Goals and objectives are a road map to your future.
2. You need a map to know where you're going and whether you have accomplished it or arrived at your destination.
3. Make a list of activities necessary to accomplish your goals (**to-do list**) and then schedule your time!
4. Planning is essential and must be done every day.
5. The **to-do list** helps you reach your goals.
6. Goals change with time and age.
7. Follow your **to-do list** and **don't procrastinate!**

## Personal Goals

A goal is an objective, something one works toward or something one would like to improve upon. Short-term goals, such as passing a test or doing well in a contest, may take little time, while long-term goals, such as finishing college or succeeding in a certain career, take much longer to accomplish.

Personal goals encompass a variety of life's endeavors, including academic performance, career achievements, and personal fulfillment. Setting and achieving one's personal goals requires self-monitoring.

(Display the "Sample Personal Goal Chart" overhead and distribute the "Personal Goal Chart" reproduced from Handouts/Overheads at the end of this lesson plan.)

The personal goal chart is a strategy for setting realistic goals for studying and carefully evaluating the ways by which those goals will be achieved. It takes into account one's motivations for fulfilling particular goals.

The chart is divided into six parts. The first column is for listing the personal study goals. Write these as specifically as possible.

The second column is for listing motivations for completing each goal. What are your reasons for wanting to attain each goal?

Column three considers the achievability of each goal. What abilities, skills, interest level, and time commitments are needed to reach each goal?

The measurability of each goal is recorded in column four. In what specific terms can your goal be measured? (Example: Number of pages read, so many widgets made, etc.)

The fifth column is for the value of each goal. Why are the goals worthwhile to you?

The final column lists the specific steps required for reaching each goal.

## Goal-Setting Exercise

(Display the "Sample Goal-Setting Worksheet" overhead and distribute the "Goal-Setting Worksheet" reproduced from Handouts/Overheads at the end of this lesson plan.)

Our next exercise is to develop our own goals. Using the Goal-Setting Worksheet, develop one personal goal to be accomplished over the next three months. Write down:

- The goal
- The objectives needed to accomplish the goal
- Steps to reach the objective
- The time frame to accomplish each objective

Don't forget that the goal must be definable, achievable, and measurable. You have 15 minutes to develop your goal and your plan for its accomplishment.

Now take the next 10 minutes to fill out the details of how you plan to accomplish your goal on the Personal Goal Chart.

After 10 minutes, call the group back to order.

Tell them: "We challenge each of you to complete the work toward your goal. Don't procrastinate and don't forget to give yourself a reward after you have accomplished your chosen goal."

## COMPONENTS OF A GOAL

A goal is a precise statement of a desired state of affairs that includes the following:

- It is realistic, attainable, and feasible, yet provides challenge and growth.
- It has a target date for completion.
- It has measurable results.
- It is clear, specific, and understandable.
- It is meaningful and relevant.
- It is beneficial.
- It is flexible and has more than one method of attainment.

An organizational goal is identical to an individual goal except that it has these additional components:

- It should be created by all members.
- It should be understandable and acceptable to all members.
- It should be beneficial to all members.

# GOAL SETTING

Goals provide direction to individuals and organizations. They enhance its operation, contribute to group maintenance and development, and give group members a sense of cohesion. The process of setting goals should be tailored to each individual's or organization's needs. Some benefit by using a highly structured goal-setting process, while others prefer a more informal process.

## Advantages of Having Goals

- People work better if they know what the goals of the organization are.
- If people have clear ideas about what they hope to accomplish, their chances of actually doing it increase.
- People will work better if they set the goals for their own jobs.
- Progress is measured in terms of what one is trying to reach.
- People are more comfortable in their job when they know how they will be evaluated.
- Goals provide people with a sense of direction and purpose.
- Letting people help set company goals is a good management practice that sets a proper mood for constructive feedback from employees.
- Well-written goals provide for a fair and clear evaluation of performance.

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## GOAL SETTING (CONTINUED)

An organizational goal is identical to an individual goal except that it has these additional components:

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### Process

The process of setting goals is similar to a problem-solving process. To simplify matters, yet ensure a goal that includes all necessary components, you can set a goal by answering the “five W’s and an H.”

- **Why?** Start by clarifying the needs and purposes of your organization that form the basis of your goals.
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Thorough planning takes several steps:

1. **Goal.** What is the overall end result you wish to achieve by executing this plan? Your goal should include the target date for beginning and completion.
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## GOAL SETTING (CONTINUED)

3. **Assumptions.** What are the factors that may affect your plan as it unfolds? What is the degree of probability that they will?
4. **Resources.** What resources do you need to carry out your plan? Resources include money, people, machines, materials, time, capabilities, experience, energy, etc. Make an inventory of all resources—anyone or anything that is available to you and usable.
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8. **Implementation.** Do it!
9. **Evaluation.** What are your milestones? What cross-checks do you need to ensure that tasks are done properly?
10. **Recycling the Planning Process.** Is further planning needed to reach your next goal? Is additional planning needed for a particularly difficult or complicated step of your plan?

### Example of an Action Plan

1. **Goal.** To improve membership recruitment, retention, and involvement.
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## GOAL SETTING (CONTINUED)

4. **Resources.** Members, executive officers, SOS professional staff members, and ready reference handouts.
5. **Deadlines.** Who: executive board—When: by next term. (Try to set a specific date if possible.)
6. **Results.** Acceptable: Membership involvement increases by 40 percent to 70 percent. Unacceptable: Membership involvement increases by less than 40 percent. Better than expected: Membership involvement increases by more than 70 percent.

### Goal-Setting Tips

1. Goals and objectives are a road map to your future.
2. You need a map to know where you're going and whether you have accomplished it or arrived at your destination.
3. Make a list of activities necessary to accomplish your goals (**to-do list**) and then schedule your time!
4. Planning is essential and must be done every day.
5. The **to-do list** helps you reach your goals.
6. Goals change with time and age.
7. Follow your **to-do list** and **don't procrastinate!**

## GOAL-SETTING PROCESS

The process of setting goals is similar to a problem-solving process. To simplify matters, yet ensure a goal that includes all necessary components, you can set a goal by answering the “five W’s and an H.”

- **Why?** Clarify the needs and purposes of your organization that form the basis for your goals.
- **What?** List possible goals, then narrow the alternatives to the ones you intend to pursue.
- **When?** Set realistic time lines for each stage in the process, including planning sessions, work sessions, and actual event.
- **Where?** Determine locations of events.
- **How?** Decide how you will implement the selected alternatives.
- **Who?** Delegate responsibilities equally to all members.

## GOAL PLANNING

Thorough planning takes several steps:

1. **Goal.** What is the overall end result you wish to achieve by executing this plan? Your goal should include the target date for beginning and completion.
2. **Objectives Within the Plan.** Each objective should state a result desired. Distinguish between long-range and short-range objectives.
3. **Assumptions.** What are the factors that may affect your plan as it unfolds? What is the degree of probability that they will?
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## SAMPLE PERSONAL GOAL CHART

Goal	Motivation	Achievable	Measurable	Value	Steps
Complete theater research paper.	Need class to graduate.  Paper is 50 percent of final grade.	Research skills  Organization  Need proofing	Due May 30  Ten to 12 pages	Enjoy topic  Enjoy doing research	<ol style="list-style-type: none"> <li>1. Get references.</li> <li>2. Take notes.</li> <li>3. Organize notes.</li> <li>4. Do first draft.</li> <li>5. Proof.</li> <li>6. Do second draft.</li> <li>7. Make copies.</li> </ol>
Read Chapters 5 through 9 for history class.	Missed 10 to 15 book questions on the last exam	Time management  Quiet room	Chapter 5 on Thursday  Chapter 6 on Friday  Chapter 7 on Monday  Chapter 8 on Wednesday  Chapter 9 on Thursday	Better preparation for the next exam  Confidence for the next exam	<ol style="list-style-type: none"> <li>1. Survey</li> <li>2. Question</li> <li>3. Read</li> <li>4. Recite</li> <li>5. Review</li> </ol>

# PERSONAL GOAL CHART

Goal	Motivation	Achievable	Measurable	Value	Steps

# SAMPLE GOAL-SETTING WORKSHEET

<b>Goal:</b> Improve next test score by one letter grade		
<b>Objective 1</b>	<b>Steps to reach objective 1</b>	<b>Time frame</b>
Take better lecture notes.	<ol style="list-style-type: none"> <li>1. Read assignments before class.</li> <li>2. Take vocabulary list to class.</li> <li>3. Take photocopies of illustrations to class.</li> <li>4. Ask questions during class.</li> <li>5. Review and reorganize lecture notes.</li> </ol>	One hour per day
<b>Objective 2</b>	<b>Steps to reach objective 2</b>	<b>Time frame</b>
Meet with the teacher.	<ol style="list-style-type: none"> <li>1. Schedule a weekly appointment.</li> <li>2. Review notes and readings before meetings.</li> <li>3. Have specific questions ready.</li> <li>4. Take notes during the meeting.</li> </ol>	One hour per week
<b>Objective 3</b>	<b>Steps to reach objective 3</b>	<b>Time frame</b>
More effective test preparation	<ol style="list-style-type: none"> <li>1. Make up practice questions.</li> <li>2. Try visual association and mnemonic strategies.</li> <li>3. Work with a study group.</li> <li>4. Do short, frequent reviews.</li> <li>5. Start preparation two weeks before a test.</li> </ol>	Three to four hours per week
<b>Objective 4</b>	<b>Steps to reach objective 4</b>	<b>Time frame</b>



# GOAL-SETTING WORKSHEET

<b>Goal:</b>		
<b>Objective 1</b>	<b>Steps to reach objective 1</b>	<b>Time frame</b>
<b>Objective 2</b>	<b>Steps to reach objective 2</b>	<b>Time frame</b>
<b>Objective 3</b>	<b>Steps to reach objective 3</b>	<b>Time frame</b>
<b>Objective 4</b>	<b>Steps to reach objective 4</b>	<b>Time frame</b>



# WORKSHOP LESSON PLAN

## TEAM BUILDING

### Description

This session introduces the leadership skill of team building. It is designed to provide usable real-life team-building and team-management skills for high school students.

### Learning Objectives

After completing this session, the student should:

- Know basic team-building principles
- Have the ability to work in teams with other students
- Know various successful techniques of team building

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Four overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of five handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Introduction

Many organizations have working groups that call themselves teams, but their work is produced by a combination of individual contributions. Teams produce work that is based on collective effort.

(Display the “What Is a Team?” overhead from Handouts/Overheads at the end of this lesson plan.)

Authors Jon Katzenbach and Douglas Smith defined a team as “A small number of people with complementary skills who are committed to a common purpose, performance goals, and common approach for which they hold themselves mutually accountable.”

**The small number** is anywhere from two to 25 members, with between five and nine as manageable and optimal. If the number goes above nine, communication tends to become centralized because members do not have an adequate opportunity to speak to each other. If the group size goes over nine, extra time and effort are required to ensure good communication.

**Complementary skills** provide synergy when the team is diverse, and various ideas and multiple skills are combined. If the team is composed of similar individuals, a sort of “group think” sets in that limits creativity and reduces the number of proposed solutions.

**Common purpose** is the driving force of teams. Each team must develop its own purpose. This purpose must be meaningful and be agreed to by everyone as individuals and as a group. A team constantly reviews its purpose, making it more relevant as the team develops and changes. Sometimes the purpose is referred to as an agenda. Hidden agendas occur when group members have their own private goals that differ from that of the team.

**Performance goals** are the acting, moving, and energizing force of the team. Specific performance goals are established, tracked, met, and evaluated in an ongoing process.

**Common approach** is the way members agree to work together. Many teams have developed their own set of rules that guide how members are to behave. Members often assume different roles to keep the team process moving and on course.

**Mutually accountable** is the aspect of teamwork that is usually the last to develop. It refers to the sense of being responsible to other team members for how well the team performs.

Ask the students what type of teams they are involved in either in school or outside activities. Write their responses on a flip chart or chalkboard.

## Five Stages of Teams

How do teams form and develop? Teams go through five stages: (1) forming, (2) storming, (3) norming, (4) performing, and (5) adjourning.

(Display the “Five Stages of Team Development” overhead and distribute the “Five Stages of Team Development” handout from Handouts/Overheads at the end of this lesson plan.)

**Forming.** In this stage, team members get to know one another. They state why they were chosen or volunteered for the team and what they hope to accomplish by becoming a team member. They begin to explore the boundaries of what constitutes acceptable behavior within the group. In this stage they change from individual to team member and test the team leader’s guidance in various ways. Forming includes these feelings and behaviors:

- Excitement, anticipation, and optimism
- Pride in being chosen for the project
- A tentative attachment to the team
- Suspicion and anxiety about the job
- Defining the tasks and how they will be accomplished
- Determining acceptable group behavior
- Deciding what information needs to be gathered
- Abstract discussions of the concepts and issues, and for some members, impatience with these discussions (There will be difficulty in identifying some of the relevant problems.)

**Storming.** This stage is probably the most difficult for the team. Members begin to realize that the tasks ahead are different from and more difficult than they had imagined. Impatient about the lack of progress, members argue about just what actions the team should take. They try to rely solely on their personal and professional

experience, and resist collaborating with most of the other team members. Storming includes these feelings and behaviors:

- Resisting the tasks
- Resisting quality improvement approaches suggested by other members
- Sharp fluctuations in attitude about the team and the project's chance of success
- Arguing among members even when they agree on the real issues
- Defensiveness, competition, and choosing sides
- Questioning the wisdom of those who selected this project and appointed the other members of the team
- Establishing unrealistic goals
- Disunity, increased tension, and jealousy

The above pressures mean that team members have little energy to spend on progressing toward the team's goal. But they are beginning to understand one another. It sometimes takes three or four meetings before the team completes this phase and arrives at the norming phase.

**Norming.** This phase is when the team reaches a consensus on what the team is to be. Everyone wants to share the newly found focus. Enthusiasm is high, and the team is tempted to go beyond the original scope of the process. During this stage, members reconcile competing loyalties and responsibilities. They accept the team, its ground rules, their roles in the team, and the individuality of fellow members. Emotional conflict lessens as members learn to cooperate. Norming includes these feelings and behaviors:

- An ability to express criticism constructively
- Acceptance of membership in the team
- An attempt to achieve harmony by avoiding conflict
- More friendliness, confiding in one another, and sharing of personal problems
- A sense of team cohesion, spirit, and goals
- Establishing and maintaining team ground rules and boundaries
- More time and energy to spend on the project as team members begin to work out their differences

**Performing.** The team has now settled its relationships and expectations. Members can begin performing by identifying and solving problems and choosing and implementing needed changes. At last, team members have discovered and accepted each other's strengths and weakness and learned what their roles are. Performing includes these feelings and behaviors:

- Member insight into personal and group processes and better understanding of each other's strengths and weakness
- Constructive self-change
- Ability to prevent or work through group problems
- Close attachment to the team

The team is now an effective, cohesive unit. You can tell when your team has reached this stage because you start getting a lot of work done.

**Adjourning.** When the team finally completes its last briefing, there is always a bittersweet sense of accomplishment coupled with a reluctance to say goodbye. Many relationships formed within these teams continue long after the team disbands.

## Team Versus Group

(Display the "Teams Versus Groups" overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout.)

Several factors separate teams from groups.

- **Roles and Responsibilities.** Within a **group**, individuals take on different roles that govern relationships between members. Roles often become a source of confusion and conflict. By contrast, a **team** shares an understanding of what the roles should be. These roles include leader, facilitator, timekeeper, and recorder.
- **Identity.** While **teams** have an identity, **groups** do not. A team has a clear understanding of its work and why it's important. Members can describe what the team needs to achieve and state the norms and values that will guide them.
- **Cohesion.** **Teams** have a spirit of camaraderie. Esprit is the spirit, soul, and state of mind of the team. Individuals begin using "we" more than "me." **Groups** remain divided.
- **Facilitation.** Facilitators help **teams** avoid getting bogged down with trivial issues. They

keep the team moving toward its ultimate goal. **Groups** have a tendency to waste time on unimportant and irrelevant issues.

- **Communication.** Members of a **group** center their communication upon themselves, without doing much real listening to one another. Differences of opinion often divide groups into opposing camps. By contrast, **team** members feel they can state their opinions, thoughts, and feelings freely. Listening is considered as important as speaking. Differences of opinion are valued and methods of managing conflict are understood. Through honest and caring feedback, members become aware of their strengths and weakness as team members. There is an atmosphere of trust and acceptance and a sense of community.
- **Flexibility.** Most **groups** are extremely rigid. **Teams**, however, maintain a high level of flexibility, and they perform different task and maintenance functions as needed. The responsibility for team development and leadership is shared. The strengths of each member are identified and used.
- **Morale.** Often, morale is a problem in **groups**. Group members lack enthusiasm and spend time complaining about procedures or other group members. By contrast, **team** members are enthusiastic about the work of the team, and each person feels pride in being a member of the team. Team spirit is high.

## Working With Others

(Display the “Personal Styles” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout.)

Although we are similar in many ways, we differ in a lot more ways. Human beings have always tried to classify things, including themselves. This section categorizes people into four types—**Driver**, **Persuader**, **Analyzer**, and **Organizer**—based on two dimensions: (1) how they deal with tasks and (2) how they relate emotionally to people.

(Go over the Personal Styles chart with students.)

Everyone uses all four styles depending upon the situation; however, the chart can be a useful tool for understanding different viewpoints. It is based

on the theory that each person tends to have one or two dominant styles.

Although it can't predict the real complexity of individuals, the chart is a useful tool to remind us that not everyone is alike in how they view things or react to situations. So if you (a **Driver**) think someone is being way too slow in getting a job done, remember that he or she may be an **Analyzer** who is trying to make certain it is done right.

Remember that an effective team needs all four types to get things done. Also, remember that most of us adopt different styles at different times, depending on the task and the people with whom we are working. Learn to value the different styles and, as team leader, to use their strengths.

## Team Checklist

(Distribute the “Team Checklist” handout from Handouts/Overheads at the end of this lesson plan.)

All too often, creativity gets stifled when everyone follows the rules or arrives at solutions the same old way. Teams often become so task-oriented that they narrow their focus much too soon by choosing the first likely solution. It's usually helpful to stop and evaluate your team's efforts once in a while. Use the “Team Checklist” handout to see how well your team is doing. It can help you refocus on areas that need improvement.

(Distribute the “Characteristics of an Effective Team” handout from the end of this session.)

Remember a team is a special thing. A team requires a clear purpose, shared leadership, and people with a diverse set of skills to be effective. The goal is not the most important thing; it's how you get to the goal that is important.

## WHAT IS A TEAM?

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## Five Stages of Team Development

**Forming.** In this stage, team members get to know one another. They state why they were chosen or volunteered for the team and what they hope to accomplish by becoming a team member. They begin to explore the boundaries of what constitutes acceptable behavior within the group. In this stage they change from individual to team member and test the team leader's guidance in various ways.

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## FIVE STAGES OF TEAM DEVELOPMENT

**Forming.** In this stage, team members get to know one another. They state why they were chosen or volunteered for the team and what they hope to accomplish by becoming a team member. They begin to explore the boundaries of what constitutes acceptable behavior within the group. In this stage they change from individual to team member and test the team leader's guidance in various ways. Forming includes these feelings and behaviors:

- Excitement, anticipation, and optimism
- Pride in being chosen for the project
- A tentative attachment to the team
- Suspicion and anxiety about the job
- Defining the tasks and how they will be accomplished
- Determining acceptable group behavior
- Deciding what information needs to be gathered
- Abstract discussions of the concepts and issues, and for some members, impatience with these discussions (There will be difficulty in identifying some of the relevant problems.)

**Storming.** This stage is probably the most difficult for the team. Members begin to realize that the tasks ahead are different from and more difficult than they had imagined. Impatient about the lack of progress, members argue about just what actions the team should take. They try to rely solely on their personal and professional experience, and resist collaborating with most of the other team members. Storming includes these feelings and behaviors:

- Resisting the tasks
- Resisting quality improvement approaches suggested by other members
- Sharp fluctuations in attitude about the team and the project's chance of success
- Arguing among members even when they agree on the real issues
- Defensiveness, competition, and choosing sides

## FIVE STAGES OF TEAM DEVELOPMENT (CONTINUED)

- Questioning the wisdom of those who selected this project and appointed the other members of the team
- Establishing unrealistic goals
- Disunity, increased tension, and jealousy

The above pressures mean that team members have little energy to spend on progressing toward the team's goal. But they are beginning to understand one another. It sometimes takes three or four meetings before the team completes this phase and arrives at the norming phase.

**Norming.** This phase is when the team reaches a consensus on what the team is to be. Everyone wants to share the newly found focus. Enthusiasm is high, and the team is tempted to go beyond the original scope of the process. During this stage, members reconcile competing loyalties and responsibilities. They accept the team, its ground rules, their roles in the team, and the individuality of fellow members. Emotional conflict lessens as members learn to cooperate. Norming includes these feelings and behaviors:

- An ability to express criticism constructively
- Acceptance of membership in the team
- An attempt to achieve harmony by avoiding conflict
- More friendliness, confiding in one another, and sharing of personal problems
- A sense of team cohesion, spirit, and goals
- Establishing and maintaining team ground rules and boundaries
- More time and energy to spend on the project as team members begin to work out their differences

## FIVE STAGES OF TEAM DEVELOPMENT (CONTINUED)

**Performing.** The team has now settled its relationships and expectations. Members can begin performing by identifying and solving problems and choosing and implementing needed changes. At last, team members have discovered and accepted each other's strengths and weakness and learned what their roles are. Performing includes these feelings and behaviors:

- Member insight into personal and group processes and better understanding of each other's strengths and weakness
- Constructive self-change
- Ability to prevent or work through group problems
- Close attachment to the team

The team is now an effective, cohesive unit. You can tell when your team has reached this stage because you start getting a lot of work done.

**Adjourning.** When the team finally completes its last briefing, there is always a bittersweet sense of accomplishment coupled with a reluctance to say goodbye. Many relationships formed within these teams continue long after the team disbands.

## TEAMS VERSUS GROUPS

Several factors separate teams from groups.

- **Roles and Responsibilities.** Within a **group**, individuals take on different roles that govern relationships between members. Roles often become a source of confusion and conflict. By contrast, a **team** shares an understanding of what the roles should be. These roles include leader, facilitator, timekeeper, and recorder.
- **Identity.** While **teams** have an identity, **groups** do not. A team has a clear understanding of its work and why it's important. Members can describe what the team needs to achieve and state the norms and values that will guide them.
- **Cohesion.** **Teams** have a spirit of camaraderie. Esprit is the spirit, soul, and state of mind of the team. Individuals begin using "we" more than "me." **Groups** remain divided.
- **Facilitation.** Facilitators help **teams** avoid getting bogged down with trivial issues. They keep the team moving toward its ultimate goal. **Groups** have a tendency to waste time on unimportant and irrelevant issues.
- **Communication.** Members of a **group** center their communication upon themselves, without doing much real listening to one another. Differences of opinion often divide groups into opposing camps. By contrast, **team** members feel they can state their opinions, thoughts, and feelings freely. Listening is considered as important as speaking. Differences of opinion are valued and methods of managing conflict are understood. Through honest and caring feedback, members become aware of their strengths and weakness as team members. There is an atmosphere of trust and acceptance and a sense of community.

## TEAMS VERSUS GROUPS (CONTINUED)

- **Flexibility.** Most **groups** are extremely rigid. **Teams**, however, maintain a high level of flexibility, and they perform different task and maintenance functions as needed. The responsibility for team development and leadership is shared. The strengths of each member are identified and used.
- **Morale.** Often, morale is a problem in **groups**. Group members lack enthusiasm and spend time complaining about procedures or other group members. By contrast, **team** members are enthusiastic about the work of the team, and each person feels pride in being a member of the team. Team spirit is high.

## PERSONAL STYLES

Profile	Style	Key (Focus)	Potential Strengths	Potential Weaknesses
A take-charge person who exerts strong influence to get things done and focuses on results. Emotions are controlled; gets results through expedience.	Driver or controller	Results and accomplishments (Get it done.)	Gets things done.  Determined, inquiring, thorough, decisive, efficient, direct	Inattentive behavior when listening to others.  Dominating, unsympathetic, demanding, critical, impatient
A social specialist who expresses opinions and emotions easily and prefers strong interaction with people. Emotions are responsive; gets results through expedience.	Persuader or enthusiast	Involvement and enthusiasm (positive ideas and responses)	Involves and works with others.  Personable, stimulating, enthusiastic, innovative	Hard time following systems or processes.  Opinionated, undependable, reactionary
A person who likes to be well-organized and thought out, prefers specific projects and activities, and enjoys putting structure to ideas. Emotions are controlled; gets results through processes.	Analyzer or theorist	Precision and accuracy (Actions will be documented.)	Great at organizing. Industrious, persistent, serious, orderly, methodical	Can have trouble when action needs to be taken immediately.  Indecisive, uncommunicative, critical
An adaptive specialist with high concern for good relationships who seeks stability and predictability and wants to be part of larger picture. Emotions are responsive; gets results through processes.	Organizer or affiliator	Relationships and stability (loyal)	Builds relationships. Cooperative, supportive, dependable, helpful	Does not want to change.  Conforming, uncommitted, hides true feelings

# TEAM CHECKLIST

## Goals

- Mission statement is clear. \_\_\_\_\_
- Objectives are measurable. \_\_\_\_\_
- Objectives are prioritized. \_\_\_\_\_
- Goals are set in all key task areas. \_\_\_\_\_

## Roles

- Individual roles, relationships, and accountabilities are clear. \_\_\_\_\_
- Style of leadership is appropriate for the team tasks. \_\_\_\_\_
- Each individual is competent to perform the individual's key tasks. \_\_\_\_\_
- The mix of roles is appropriate to the team tasks. \_\_\_\_\_

## Procedures

- Decisions reached are effective. \_\_\_\_\_
- Management information is effectively shared. \_\_\_\_\_
- Key activities are effectively coordinated. \_\_\_\_\_
- Products and services are of a high quality. \_\_\_\_\_
- Conflict is managed effectively within the team. \_\_\_\_\_

## Internal Relationships

- There are no areas of mistrust. \_\_\_\_\_
- Feedback is constructive. \_\_\_\_\_
- Relationships are supportive and noncompetitive. \_\_\_\_\_

## External Relationships

- Relationships with key external groups are effective. \_\_\_\_\_
- Mechanisms are in place to integrate with each key group. \_\_\_\_\_
- Time and effort is spent on identifying, building, and monitoring key external relationships.  
\_\_\_\_\_

# CHARACTERISTICS OF AN EFFECTIVE TEAM

**“A team is a small number of people with complementary skills who are committed to a common purpose, performance goals and approach for which they hold themselves mutually accountable.”**

**—Jon Katzenbach and Douglas Smith, *The Wisdom of Teams***

1. The team has a clear purpose. Mission and vision are defined and mutually agreed upon.
2. Everyone understands their roles. People do what’s expected of them and carry their share of the load.
3. Leadership is shared among the members, though there is a formal leader (e.g., for special tasks).
4. An environment that invites participation is created and nurtured.
5. The team operates by consensus. Unanimity is unrealistic and compromise is undesirable. (Compromise doesn’t foster a team approach and creates winners and losers.)
6. Constructive disagreement is not only normal, but also healthy because it promotes critical thinking.
7. Members get issues out on the table. There are no hidden agendas. Open communication is encouraged.
8. Effective listening is employed; members use techniques such as paraphrasing, questioning, and summarizing.
9. Members seek to create an informal working atmosphere.
10. The team has a balanced skill set. A diversity of personality and work styles is necessary for the team to be effective and maximize potential.
11. The team takes time for reflection, e.g., about problems faced and how they were solved. Learning is essential to the continued development of a team.
12. Members ensure that fun is built into their activities and work.

Remember: An effective team isn’t just concerned with getting work done but also with HOW it gets done.



# WORKSHOP LESSON PLAN

## EFFECTIVE GROUP MANAGEMENT

### Description

This session introduces the skill of group management.

### Learning Objectives

After completing this session, the student should know:

- Basic group management principles
- The role of group management in leadership
- Various successful techniques of group management

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Five overhead transparencies reproduced from Handouts/Transparencies at the end of this session
- Copies of five handouts reproduced from Handouts/Transparencies at the end of this session (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Leadership Strategies

Leading a group comes down to motivation and sharing leadership.

Ask the students what they would do to keep their team working. That is, what techniques would they use to lead a group? Write their answers on a flip chart pad or chalkboard.

People have different reasons for participating in a group. They receive different benefits or rewards. Some like the sense of belonging, others like being informed, while still others enjoy the opportunity to receive counsel and advice.

As a group leader, you should remember that your members have different motivations for belonging to the group; therefore, no one leadership strategy will work for everyone. You must use a variety of group management techniques to be a successful leader.

Influencing people's motivation means getting them to want to do what you know must be done. A person's motivation depends upon two things:

**The strength of certain needs.** For example, you are hungry, but you must have a task completed by a deadline that is fast approaching. If you are starving you will eat. If you are slightly hungry you will finish the task at hand.

**Perception of outcomes.** For example, you have two burning needs: the desire to complete the task and the desire to go to lunch. Your perception of how you view those two needs will determine which one takes priority. If you believe you could be fired for not completing the task, you will probably put off lunch and complete the task. If you believe you will not get into trouble or perhaps will finish the task in time, then you will likely go to lunch.

(Display the "Keys to Effective Group Leadership" overhead and handout reproduced from Handouts/Overheads at the end of this lesson plan. Discuss them with the students.)

**Motivations in people differ.** A wide variety of things motivate people. Some motivations are internal, such as fears, values, and beliefs. Others are external, such as danger, the environment, or pressure from a loved one. Knowing that different people react differently to different needs will

help guide your decisions and actions in certain situations.

**Leaders can influence motivation.** While people have individual motivations for their actions, a good leader can influence their behavior by following some basic group management principles.

**Make individual and group needs overlap.** Nearly all people are influenced by the need for job security, promotion, raises, and the approval of their peers and leaders. Your organization needs workers who are skilled, well-trained, and dedicated. When your workers see that good job performance results in promotions and pay increases, they are more likely to perform well on the job. The needs of the individual and the needs of the organization overlap.

**Reward good behavior.** Although a certificate, letter, or a thank-you note may seem small, they can be powerful motivators. The reward should be specific and prompt. Do not write, "for doing a good job." Cite the specific action that made you believe it was a good job. In addition, help your people when they make a mistake. They will see that you are trying to help them grow, and they, in turn, will want to do their best for you in the future.

**Set the example.** You must be the role model that you want your people to follow. Be certain that you conduct yourself in appropriate ways at all times, both at work and elsewhere. You never know when someone is watching you.

**Develop morale and esprit.** How do your workers feel about their workplace? Is it a place they enjoy coming to or is it a place from which they cannot wait to escape? Create an atmosphere where there is a team spirit, where there are friendships, and where there is a sense of working together for a common purpose and in accord.

**Involve members in decisions.** There are several reasons for involving members in decisions. First, it teaches them and allows you to coach them. Second, it motivates them. People who are part of the decision-making process become the owners of it. Involvement in decisions gives them a personal interest in seeing the plan succeed. Third, communication is clearer. Members have a better understanding of what role they must play as part

of the team. Next, it creates an open and trusting communication bond. Members are no longer just the doers for the organization. Now they are part of it. Finally, involving members in decisions shows that you recognize and appreciate them. Recognition and appreciation from a respected leader are powerful motivators.

**Look out for your people.** Although you do not have control over their personal lives, you must show concern for them. Things that seem of little importance to you may be critical to them. Learn to empathize—to see things from their viewpoint. When you can legitimately accommodate their needs, do so. They will learn to trust you and will give you their loyalty.

**Keep team members informed.** Keeping the communication channel open allows people to have a sense of control over their lives. It also signals them that you are open to receiving information. This means people will be more likely to provide you with the feedback you need as leader in order to avoid problems or to make various decisions and judgments regarding your job.

**Make jobs challenging.** Make workers feel they are individuals in a great team, not cogs in a lifeless machine. People need meaningful work, even if it is tiring and unpleasant; they need to know it is important and necessary for the survival of the organization.

**Give appropriate counsel.** All the guidelines before this took the positive approach. But this does not always work. You must let people know when they are not performing up to acceptable standards. Similarly, you must protect them when needed. For example, if someone in your department is always late arriving for activities and it is causing disruptions, you must act. On the other hand, if you have an extremely good team and occasionally members are a few minutes late, then it is probably best to overlook it.

**Share leadership with the team.** People respond when they are a part of the solution. They bring new perspectives to problems. They bring another “pair of hands” to do the work. The members of the team may solve the problem in a different way than you would, but as long as it meets the team’s goals and standards, it’s OK.

Now ask the students to compare these keys to group management with their earlier suggestions on how they would keep their team working.

(Display the “Counseling” overhead from Handouts/Overheads at the end of this lesson plan and distribute the “Counseling” handout. Discuss the points of counseling with the students.)

## Counseling

Counseling is talking with people in a way that helps them solve a problem or change their behavior. Leaders who are effective counselors can have a powerful, long-term impact on people and on the effectiveness of their organizations. When done appropriately, counseling involves thinking, compassion, timing, sincerity, and an understanding of human nature. It involves much more than simply telling someone what to do about something.

Leaders must demonstrate the following qualities in order to counsel effectively:

**Respect for employees.** This quality includes the belief that individuals are responsible for their actions and ideas. It also includes an awareness of people’s individuality—their unique set of values, attributes, and skills. As you attempt to develop people through counseling, you must refrain from projecting your own values onto them.

**Self-awareness.** This quality is an understanding of yourself as a leader. The more you are aware of your own values, needs, and biases, the less likely you will be to project your feelings onto your employees.

**Credibility.** Leaders gain credibility by being honest and by making certain their actions conform to their words. They are straightforward with subordinates and behave so people can respect and trust their word.

**Empathy.** This means seeing things from someone else’s viewpoint. Empathetic leaders are better able to help subordinates identify problems and develop plans to solve them.

Counseling is intended to help individuals and the organization for which they work. Company rules and policy require that counseling be given in certain situations. For example, some companies put an employee on notice for being consis-

tently late to work. At other times, a leader may choose to offer counseling to help an employee overcome a problem or improve performance. Regardless of the nature of the counseling, leaders should demonstrate the qualities of an effective counselor (respect, self-awareness, credibility, and empathy) and employ the skills of communication.

## Steps for Counseling

Although leaders often talk of different kinds of counseling (performance, problem, and individual counseling), the same steps are necessary to prepare for each type.

**Identify the problem.** Ensure you really know the problem—the Japanese use a practice called the “Five Why’s.” They ask “why” five times when confronted with a problem. By the time the fifth why is answered, they believe they have found the ultimate cause of the problem.

**Analyze the forces influencing the behavior.** Determine which forces you have control over and which the worker has control over. Determine if the force has to be modified, eliminated, or enforced.

**Plan, coordinate, and organize the session.** Determine the best time to conduct the session so you will not be interrupted or forced to end too soon.

**Conduct the session using sincerity, compassion, and kindness.** This does not mean you cannot be firm or in control. Your reputation is on the line. The problem must be solved so your organization can continue with its mission. Likewise, you must hear the person out.

**Ask the worker the cause of and solution to the problem.** See if your initial analysis was correct or not. The worker may see a solution you had not considered. In contrast, this may show that the worker has not really accepted the fact that there is a problem.

**Choose appropriate method of counseling.** Try to maintain a sense of timing about when to use directive counseling (you name the problem and suggest a solution) or nondirective counseling (the person identifies the problem and determines a solution with the help of the counselor).

**Make a plan of action.** Using all the facts, make a decision and/or a plan of action to correct the problem. If more counseling is needed, make a firm time and date for the next session.

**Be sure to evaluate with follow-up.** After the session and throughout a sufficient time period, evaluate the worker’s progress to ensure the problem has been solved.

## Hints for Counseling

(Display the “Hints for Counseling Sessions” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout. Discuss hints for counseling with the students.)

- Let the person know that the behavior—not the person—is undesirable.
- Let the person know that the leader cares about him/her as a person, but expects more from him/her.
- Do not punish employees who are unable to perform a task. Punish those who are able to perform the task, but are unwilling or unmotivated to succeed.
- Punish in private soon after the undesirable behavior. Do not humiliate a person in front of others.
- Ensure that the employee understands exactly what behavior led to the punishment.
- Do not hold a grudge after punishing. When a punishment is over, it is over.

## Appraising Performance

(Display the “Appraising the Performance of Your Members” overhead and distribute the “Appraising the Performance of Your Members” handout from Handouts/Overheads at the end of this lesson plan. Discuss appraising with the students.)

The performance appraisal is one of the most powerful motivational tools available to a leader. It has three main objectives.

**To measure performance fairly and objectively against job requirements.** This allows effective team members to be rewarded for their efforts and ineffective workers to be put on notice for poor performance.

**To increase performance by identifying specific development goals.** As Lewis Carroll wrote in *Alice's Adventures in Wonderland* (1865), "If you don't know where you are going, any road will take you there." The appraisal allows the worker to target specific areas for job growth. It should be a time to plan for better performance on the job.

**To develop personal goals so the member may keep pace with the requirements of a fast-paced organization.** More and more, every job in an organization becomes more demanding with new requirements. Just because members are performing effectively in their jobs now does not mean they will be able to perform effectively in the future. They must be allowed to grow with the job and the organization.

## Hints for Appraisal

**A worker should not walk blindly into a performance appraisal.** Past counseling sessions, feedback, and one-on-ones should give the worker a pretty clear understanding of what to expect from the appraisal. If you blindside the employee, you have not done your job as a leader. Helping your people grow is not a once or twice yearly duty, but a daily duty.

**The appraisal should be a joint effort.** No one knows the job better than the person performing it. By turning the appraisal into a real discussion, the leader could gain some insight that could help boost performance in the future. Before the meeting, have the worker complete a self-appraisal. Although you might think workers will take advantage of this by giving themselves unearned high marks, studies have shown that most people are harder on themselves than the leader would have been.

**Don't hesitate to handle people problems as they occur.** Very rarely do problems improve by just letting them go. Often simple problems become major problems simply because of neglect by the group leader.

## Practical Exercise

Pick a problem from the following list and ask the students to give solutions that might work to solve the management problem. You should assume that there are no other problems with the employee, and that the employee is a good worker.

Also have the students indicate what change in behavior should be expected. Write the results on a flip chart or chalkboard.

- A member who leaves early from meetings
- A group of members who almost never smile
- A member who has a large number of mistakes
- A member who has no initiative
- A member who does not want to perform a task according to a new procedure
- A member who constantly talks back when given instructions

## Creating Involvement

An important means of increasing involvement is to create interest in a particular learning task or topic. Unfortunately, this may be easier said than done. Methods for creating interest will vary significantly according to personal preferences, personal experience and background, and subject matter. Seven suggestions for adding or creating involvement in a task are listed below.

(Display the "Creating Involvement" overhead and distribute the "Creating Involvement" handout from Handouts/Overheads at the end of this lesson plan. Discuss creating involvement with the students.)

### NOVELTY

Get motivated to complete an ordinary or mundane task by adding a little novelty to it.

### VARIETY

Another strategy is to obtain information about the task from a variety of sources. Different perspectives on a subject often help generate interest. A topic may not seem interesting as presented in a book, but may be interesting in another format.

Don't rely solely on textbooks or lectures for information, but supplement them with magazine articles, newspaper articles, television shows, radio programs, conversations with other students, conversations with other experts or knowledgeable people, museum exhibits, etc. For example, to learn about the major battles of a war, one might read novels, watch movies, attend reenactments, or talk with participants or their descendants.

## **RELEVANCE**

A third strategy is to recognize how the task is relevant to one's personal experiences and knowledge base. Tasks often become more meaningful when one ties them to existing information. Meaningful tasks enhance motivation.

For example, relate math geometry equations to your summer job as a construction worker or your experience in ordering carpet or wallpaper. Apply new knowledge about sibling relations from psychology to your own family experiences. Relate geology landscape studies to your farming knowledge.

## **PERSONALIZE**

Making new information personal helps create interest in uninteresting subjects. Try relating the new information to matters of personal concern. For example, relate what is learned in history class to current political issues about which you are concerned. Relate new sociology information to personal family issues.

## **ACTIVELY USE KNOWLEDGE**

Make active use of new knowledge in order to develop and maintain interest in it. Ask questions of yourself, your classmates, and your instructor. Anticipate the next steps in the course. Talk about the new information with friends, family, and classmates. Think about it during that extra free time while walking to class or waiting in line. Write about the new knowledge in a journal, or make up a story using the information.

## **APPLY KNOWLEDGE**

Create interest by applying new knowledge learned in one course to another course. Apply new knowledge from school to your job, or new knowledge from your job to school. For example, apply knowledge from chemistry class to the study of rock and mineral composition in geology class. Apply information from history class to a political science course. Skills of persuasion learned on the job may be applied to a marketing course.

## **WORK WITH OTHERS**

Form study groups or less formal meetings with classmates to discuss new information. Other students often are able to offer new perspectives on information that may be more interesting to you than those presented in class. Other students may share personal experiences related to the new knowledge that you find interesting.

## **Closing**

Effective management involves many techniques, including motivating, delegating, involving, counseling, appraising, etc. The best way to learn the management techniques is to practice them.

## KEYS TO EFFECTIVE GROUP LEADERSHIP

- Motivations in people differ.
- Leaders can influence motivation.
- Make individual and group needs overlap.
- Reward good behavior.
- Set the example.
- Develop morale and esprit.
- Involve members in decisions.
- Look out for your people.
- Keep team members informed.
- Make jobs challenging.
- Give appropriate counsel.
- Share leadership with the team.

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## KEYS TO EFFECTIVE GROUP LEADERSHIP (CONTINUED)

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# COUNSELING

Leaders must demonstrate the following qualities in order to counsel effectively:

- Respect for employees
- Self-awareness
- Credibility
- Empathy

## Steps for Counseling

- Identify the problem.
- Analyze the forces influencing the behavior.
- Plan, coordinate, and organize the session.
- Conduct the session using sincerity, compassion, and kindness.
- Ask the worker the cause of and solution to the problem.
- Choose the appropriate method of counseling.
- Make a plan of action.
- Be sure to evaluate with follow-up.

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Counseling is intended to help individuals and the organization for which they work. Company rules and policy require that counseling be given in certain situations. For example, some companies put an employee on notice for being consistently late to work. At other times, a leader may choose to offer counseling to help an employee overcome a problem or improve performance. Regardless of the nature of the counseling, leaders should demonstrate the qualities of an effective counselor (respect, self-awareness, credibility, and empathy) and employ the skills of communication.

## Steps for Counseling

**Identify the problem.** Ensure you really know the problem—the Japanese use a practice called the “Five Why’s.” They ask “why” five times when confronted with a problem. By the time the fifth why is answered, they believe they have found the ultimate cause of the problem.

## COUNSELING (CONTINUED)

**Analyze the forces influencing the behavior.** Determine which forces you have control over and which the worker has control over. Determine if the force has to be modified, eliminated, or enforced.

**Plan, coordinate, and organize the session.** Determine the best time to conduct the session so you will not be interrupted or forced to end too soon.

**Conduct the session using sincerity, compassion, and kindness.** This does not mean you cannot be firm or in control. Your reputation is on the line. The problem must be solved so your organization can continue with its mission. Likewise, you must hear the person out.

**Ask the worker the cause of and solution to the problem.** See if your initial analysis was correct or not. The worker may see a solution you had not considered. In contrast, this may show that the worker has not really accepted the fact that there is a problem.

**Choose appropriate method of counseling.** Try to maintain a sense of timing about when to use directive counseling (you name the problem and suggest a solution) or nondirective counseling (the person identifies the problem and determines a solution with the help of the counselor).

**Make a plan of action.** Using all the facts, make a decision and/or a plan of action to correct the problem. If more counseling is needed, make a firm time and date for the next session.

**Be sure to evaluate with follow-up.** After the session and throughout a sufficient time period, evaluate the worker's progress to ensure the problem has been solved.

## **HINTS FOR COUNSELING SESSIONS**

- Let the person know that the behavior—not the person—is undesirable.
- Let the person know that the leader cares about him as a person, but expects more from him.
- Do not punish employees who are unable to perform a task. Punish those who are able to perform the task, but are unwilling or unmotivated to succeed.
- Punish in private soon after the undesirable behavior. Do not humiliate a person in front of others.
- Ensure that the employee understands exactly what behavior led to the punishment.
- Do not hold a grudge after punishing. When a punishment is over, it is over.

# APPRAISING THE PERFORMANCE OF YOUR MEMBERS

The performance appraisal is one of the most powerful motivational tools available to a leader. It has three main objectives:

- To measure performance fairly and objectively against job requirements
- To increase performance by identifying specific development goals
- To develop personal goals so the member may keep pace with the requirements of a fast-paced organization

## Hints for Appraisal

- A worker should not walk blindly into a performance appraisal.
- The appraisal should be a joint effort.
- Don't hesitate to handle people problems as they occur.

# APPRAISING THE PERFORMANCE OF YOUR MEMBERS

The performance appraisal is one of the most powerful motivational tools available to a leader. It has three main objectives.

- To measure performance fairly and objectively against job requirements. This allows effective team members to be rewarded for their efforts and ineffective workers to be put on notice for poor performance.
- To increase performance by identifying specific development goals. As Lewis Carroll wrote in *Alice's Adventures in Wonderland* (1865), "If you don't know where you are going, any road will take you there." The appraisal allows the worker to target specific areas for job growth. It should be a time to plan for better performance on the job.
- To develop personal goals so the member may keep pace with the requirements of a fast-paced organization. More and more, every job in an organization becomes more demanding with new requirements. Just because members are performing effectively in their jobs now does not mean they will be able to perform effectively in the future. They must be allowed to grow with the job and the organization.

## Hints for Appraisal

A worker should not walk blindly into a performance appraisal. Past counseling sessions, feedback, and one-on-ones should give the worker a pretty clear understanding of what to expect from the appraisal. If you blindside the employee, you have not done your job as a leader. Helping your people grow is not a once or twice yearly duty, but a daily duty. The appraisal should be a joint effort. No one knows the job better than the person performing it. By turning the appraisal into a real discussion, the leader could gain some insight that could help boost performance in the future. Before the meeting, have the worker complete a self-appraisal. Although you might think workers will take advantage of this by giving themselves unearned high marks, studies have shown that most people are harder on themselves than the leader would have been.

Don't hesitate to handle people problems as they occur. Very rarely do problems improve by just letting them go. Often simple problems become major problems simply because of neglect by the group leader.

## **CREATING INVOLVEMENT**

An important means of increasing involvement is to create interest in a particular learning task or topic. Unfortunately, this may be easier said than done. Methods for creating interest will vary significantly according to personal preferences, personal experience and background, and subject matter. Seven suggestions for adding or creating involvement in a task are listed below.

1. Novelty
2. Variety
3. Relevance
4. Personalize
5. Actively use knowledge
6. Apply knowledge
7. Work with others



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## Novelty

Get motivated to complete an ordinary or mundane task by adding a little novelty to it.

## Variety

Another strategy is to obtain information about the task from a variety of sources. Different perspectives on a subject often help generate interest. A topic may not seem interesting as presented in a book, but may be interesting in another format.

Don't rely solely on textbooks or lectures for information, but supplement them with magazine articles, newspaper articles, television shows, radio programs, conversations with other students, conversations with other experts or knowledgeable people, museum exhibits, etc. For example, to learn about the major battles of a war, one might read novels, watch movies, attend reenactments, or talk with participants or their descendants.

## Relevance

A third strategy is to recognize how the task is relevant to one's personal experiences and knowledge base. Tasks often become more meaningful when one ties them to existing information. Meaningful tasks enhance motivation.

For example, relate math geometry equations to your summer job as a construction worker or your experience in ordering carpet or wallpaper. Apply new knowledge about sibling relations from psychology to your own family experiences. Relate geology landscape studies to your farming knowledge.

## Personalize

Making new information personal helps create interest in uninteresting subjects. Try relating the new information to matters of personal concern. For example, relate what is learned in history class to current political issues about which you are concerned. Relate new sociology information to personal family issues.

## CREATING INVOLVEMENT (CONTINUED)

### Actively Use Knowledge

Make active use of new knowledge in order to develop and maintain interest in it. Ask questions of yourself, your classmates, and your instructor. Anticipate the next steps in the course. Talk about the new information with friends, family, and classmates. Think about it during that extra free time while walking to class or waiting in line. Write about the new knowledge in a journal, or make up a story using the information.

### Apply Knowledge

Create interest by applying new knowledge learned in one course to another course. Apply new knowledge from school to your job, or new knowledge from your job to school. For example, apply knowledge from chemistry class to the study of rock and mineral composition in geology class. Apply information from history class to a political science course. Skills of persuasion learned on the job may be applied to a marketing course.

### Work With Others

Form study groups or less formal meetings with classmates to discuss new information. Other students often are able to offer new perspectives on information that may be more interesting to you than those presented in class. Other students may share personal experiences related to the new knowledge that you find interesting.

# WORKSHOP LESSON PLAN

## MOTIVATION

### Description

This session introduces the leadership skill of motivation.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of group motivation
- The role of group motivation in leadership
- Various successful techniques of group motivation

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Three overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of four handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Background

Tell students: Psychologists tell us that motivation comes from inside the individual and is based on inner needs and desires. Therefore, taken literally, it is impossible to motivate someone from the outside. We can do things that trigger that inner drive to fulfill an inner need or desire, as when we place a hamburger in front of a hungry teenager.

Psychologist Abraham Maslow divides human needs into two groups: (1) basic needs, such as food and shelter, and (2) higher needs, which we seek only after fulfilling our basic needs.

(Display the “Maslow’s Hierarchy of Needs” overhead and distribute the “Maslow’s Hierarchy of Needs” handout from Handouts/Overheads at the end of this lesson plan.)

Basic needs include levels one to four. The higher needs include levels five to eight.

### BASIC NEEDS

1. **Physiological.** Seek food, water, shelter, sex.
2. **Safety.** Feel free from immediate danger.
3. **Belongingness and love.** Belong to a group, have close friends.
4. **Esteem.** Seek recognition, move up in the world, reduce doubts about yourself.

### HIGHER NEEDS

5. **Cognitive.** Seek learning for its own sake and contribute to knowledge.
6. **Aesthetic.** Feel at peace and be more curious about the inner workings of all.
7. **Self-actualization.** Know exactly who you are, where you are going, and what you want to accomplish.
8. **Self-transcendence.** Be concerned with things outside of self: the welfare of others and spiritual experiences.

Maslow said a higher need will become a motive for behavior only if the needs below it have been satisfied. This helps us, as leaders, understand more about people’s motivation. For example, a person who is hungry or who lacks shelter will not be motivated by the possibility of winning a blue ribbon in some athletic competition as much as the person whose basic needs have already been met.

It should be noted that almost no one stays in one particular level for an extended period. We constantly strive to move up, while at the same time forces outside our control push us back down. Those on top get pushed down for short periods (for example, by the death of a loved one or because of an idea that does not work). Those on the bottom get pushed up (for example, by finding a well-paying job or coming into an inheritance).

Our goal, as leaders, is to help our people obtain the skills and knowledge that will push them up the hierarchy permanently. People who have their basic needs met become much better workers. They are able to concentrate on fulfilling the visions put forth to them, instead of constantly worrying about how to make ends meet.

(Display the “Characteristics of Self-Actualizing People” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout. Discuss the characteristics with the students.)

Self-actualizing people:

- Have better perceptions of reality and are comfortable with reality.
- Accept themselves and their own natures.
- Lack artificiality.
- Focus on problems outside themselves and are concerned with basic issues and eternal questions.
- Like privacy and tend to be detached.
- Rely on their own development and continued growth.
- Appreciate the basic pleasures of life (do not take blessings for granted).
- Have a deep feeling of kinship with others.
- Are deeply democratic and are not really aware of differences.
- Have strong ethical and moral standards.
- Are original and inventive, less constricted, and fresher than others.

Maslow says we are constantly trying to reach the level of self-actualization. Occasionally, we do reach that level. Above that is the spiritual level, where we find people such as Gandhi, Mother Theresa, the Dalai Lama, and even the poet Rob-

ert Frost. At this level, people are concerned with ethics, compassion, creativity, and spirituality.

## Needs Motivate People

The basic message of Maslow's theory for leaders is that people's own needs and wants motivate them. Good managers recognize this principle and use it by offering opportunities and incentives that allow workers to meet their needs and move to a higher level in Maslow's hierarchy.

Good managers methodically determine what each employee needs, rewarding the employee accordingly. Poor leaders simply guess and take a shot. One skill of a good leader is the ability to match the rewards and incentives in an organization with the underlying needs and wants of the workers. When this match occurs, motivation and morale will be high. This suggests that leaders who know their workers well will be more likely to offer appropriate incentives than those who don't know their employees well.

(Display the "Application of Maslow" overhead and distribute the "Application of Maslow" handout from Handouts/Overheads at the end of this lesson plan.)

## Application of Maslow

Here is how you, the leader, begin to apply Maslow's theory. Improvise as you see fit, but this will get you started. Before you begin, understand the following ground rules:

1. Every person must fit into one, and only one, of these categories at any one time.
2. On the way up, advancement from one category to another must be in order.
3. On the way up, no category is skipped.

This is a **three-step process**: interview, estimate, and choose. Interview the member, estimate the member's level of existence and type of need, and choose rewards accordingly. It might take a while before you perfect your technique, but the basic application of this theory is easy. Even a leader who uses this theory for the first time should be able to choose a more effective reward than would be chosen simply by guessing.

**First**, interview members to learn, among other things, what is most important to them and what

changes they would like to see. Do this through direct questions and answers, but be aware that people sometimes say what they think you want to hear. Find out as much as you can, and take notes.

**Second**, study your interview notes to determine the level the member has reached within Maslow's hierarchy of needs.

**Third**, choose an appropriate reward or incentive that would meet the needs of the member and the purposes and aims of your organization.

(Distribute the "Appropriate Rewards and Incentives" handout from Handouts/Overheads at the end of this lesson plan. Then ask the students how they would motivate someone at each of the following levels.)

**Self-Actualization.** If a team member is fortunate enough to exist at the top of Maslow's pyramid, then the primary need that team member has is for self-improvement. You may help them fulfill their self-fulfillment needs by increasing their level of challenge, responsibility, or authority. Special assignments and projects and the provision of advanced training will also contribute to their development.

**Esteem.** Esteem needs are satisfied through status and recognition. People at this level may receive fulfillment through personal and public recognition of achievement, such as awards, commendation letters, and promotions. An "outstanding member" plaque or a "member-of-the-month" framed photograph in a prominent place will help satisfy the esteem needs of some of your best members.

**Social.** Social needs are fulfilled by promoting a sense of affiliation, friendship, and acceptance. Use team structures, hold social functions, distribute employee newsletters, and call frequent discussion meetings. Distribution of company sweatshirts, T-shirts, mouse pads, etc., with the company name and/or slogan or a company (or team) photo may also help fulfill social needs.

**Safety.** These needs are met by providing job and income security and a safe work environment. Good communication between the employee and management is very important. Mutually agreed upon performance expectation standards, includ-

ing the possible consequences of failure to meet these standards, will provide a sense of safety by alleviating the fear of the unknown.

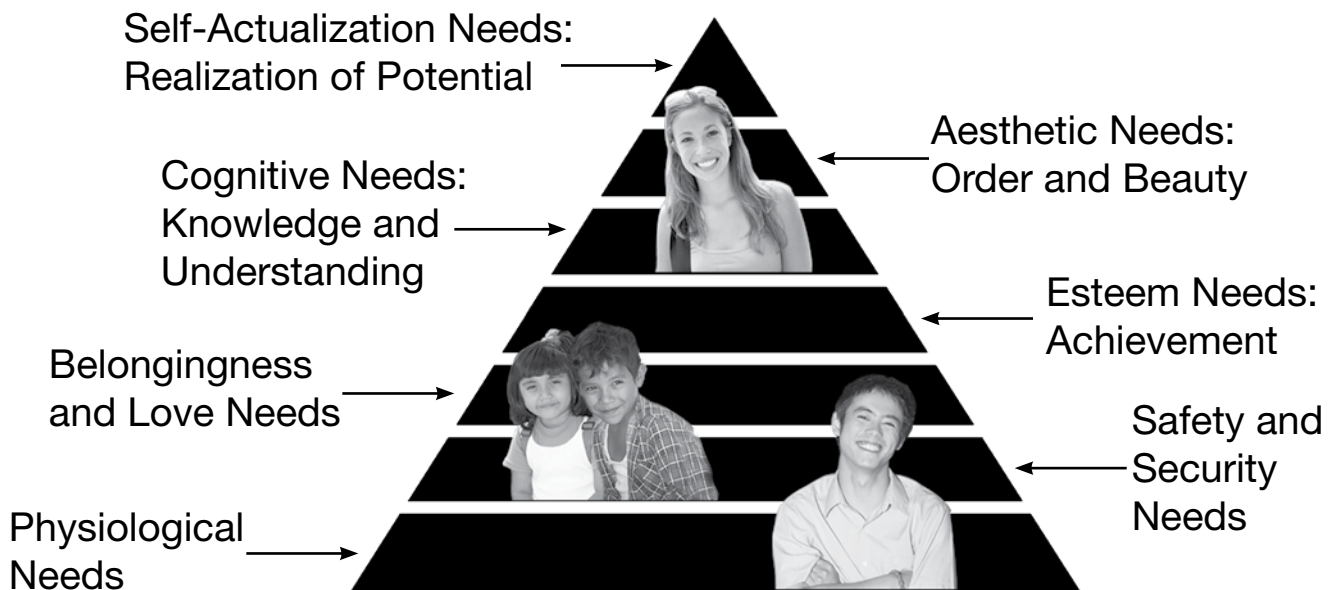
**Physiological.** Vital needs are satisfied by food, shelter, clothing, and health care. Providing the employee with adequate income and benefits is what is required here. If an employee does not see to his own vital needs, though able to, then psychological counseling may be needed.

## Closing

Application of Maslow's theory to employee motivation is a simple way to improve your success with motivating the members of the team you will lead.

# MASLOW'S HIERARCHY OF NEEDS

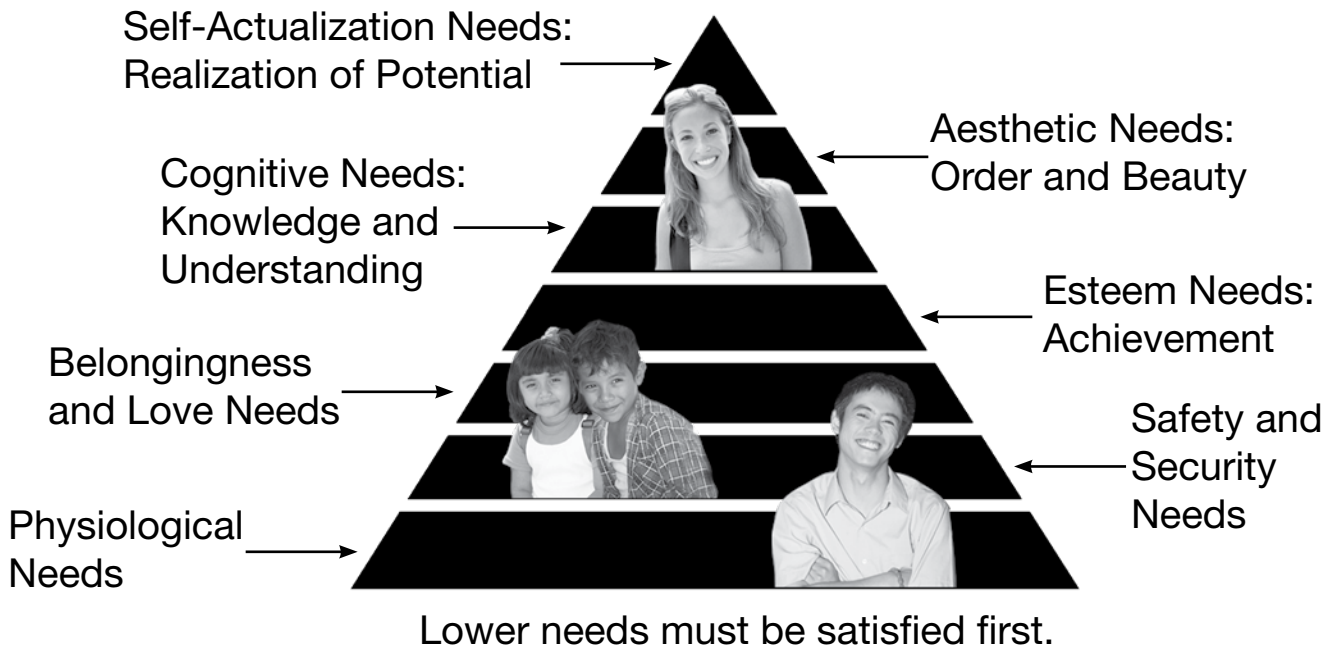
## Maslow's Hierarchy



Lower needs must be satisfied first.

# MASLOW'S HIERARCHY OF NEEDS

## Maslow's Hierarchy



### Basic Needs

Seek food, water, shelter, and sex.

Feel free from immediate danger.

Belong to a group and have close friends.

Seek recognition, move up in the world, and reduce doubts about yourself.

### Higher Needs

Seek learning for its own sake and contribute to knowledge.

Feel at peace and be more curious about the inner workings of all.

Know exactly who you are, where you are going, and what you want to accomplish.

Be concerned with things outside of self: the welfare of others and spiritual experiences.



## CHARACTERISTICS OF SELF-ACTUALIZING PEOPLE

Self-actualizing people:

- Have better perceptions of reality and are comfortable with reality.
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- Lack artificiality.
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## APPROPRIATE REWARDS AND INCENTIVES

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# WORKSHOP LESSON PLAN

## MANAGING THROUGH OTHERS/DELEGATING

### Description

This session introduces the skill of managing by delegation.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of managing by delegation
- The role of delegation in leadership
- Various successful techniques of managing through others

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Two overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan.
- Copies of three handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Need to Delegate

Tell students: The inability to delegate is one of the most common problems of new leaders. They believe they can do a better job themselves. They don't want to risk losing any of their power and stature. (Ironically, they do lose these if they don't learn to delegate effectively.) They are not familiar with the talents and abilities of their workers. Often, they don't want to risk giving authority to team members in case the team members fail and impair the organization.

But effective management is all about getting results by organizing and supervising a workforce. Poor delegation or no delegation is inefficient and expensive. The worst thing about not delegating is that managers are losing wonderful opportunities to train their workers.

(Display the "Signs of Trouble" overhead from Handouts/Overheads at the end of this lesson plan and discuss it with the students.)

Not everyone can delegate well. Some signs that you may need help with delegation skills include:

- Constantly taking work home with you and/or working overtime
- Not receiving work on time that you assigned to employees
- Finding a pile of work awaiting you when you return from an absence
- Making decisions without staff input, thus causing resentment

## Manage Through Others

Ask the students what managing through others means. Write their responses on a flip chart or chalkboard.

**Reasons to delegate.** Delegation is hard work, but it's work that is needed to help an organization grow and improve. There basically are two good reasons to delegate: (1) It gets the job done more efficiently, and (2) it provides training and new experiences for members of work teams. What managing through others comes down to is sharing leadership.

**Important management tool.** As a leader, you need to learn to use this important management skill. Learning to delegate is not failure to do your

job. It is doing your job right—if you get regular feedback on results.

**What does it mean to delegate?** Just giving someone tasks to do is not really delegation. Real delegation involves giving someone the authority to make decisions that you normally make.

Writer Andrew E. Schwartz says, "Too many managers waste both time and energy performing tasks an employee could perform just as well, thereby lowering productivity while raising operating costs. The answer to the problem is easy—delegation."

(Display the "Steps to Accomplish Delegation" overhead and distribute the "Steps to Accomplish Delegation" handout from Handouts/Overheads at the end of this lesson plan. Discuss the steps with the students.)

## Follow Basic Rules

Learning how to delegate is easy if you follow some simple management rules suggested by Thomas Horton in a 1992 article:

- **Delegate the whole task to one person.** This gives the person the responsibility and increases the person's motivation.
- **Select the right person.** Assess the skills and capabilities of subordinates and assign the task to the most appropriate one.
- **Clearly specify your preferred results.** Give information on what, why, when, who, where, and how. Write this information down.
- **Delegate responsibility and authority.** Assign the task, not the method to accomplish it. Let the subordinate complete the task in the manner the subordinate chooses, as long as the results are what the supervisor specifies. Let the employee have strong input about the completion date of the project. Note that you may not even know how to complete the task yourself—this is often the case with higher levels of management.
- **Ask the employee to summarize.** Have the employee summarize the assignment you have just made to make certain you were understood. Avoid future misunderstandings by making certain you both are in agreement now.

- **Get ongoing nonintrusive feedback.** Part of your responsibility is to seek nonintrusive feedback about progress on the project. Ask for weekly, written status reports. Reports should cover what the employee did during the week, what the employee plans to do next week, and any potential issues. Regular staff meetings provide this ongoing feedback, as well.
- **Maintain open lines of communication.** Don't hover over the subordinate, but get a sense of what they're doing and support their checking in with you along the way.
- **Provide encouragement when needed.** If you're not satisfied with the progress, don't immediately take the project back. Provide encouragement or brief assistance, but make certain the subordinate continues to see the project as the subordinate's responsibility.
- **Evaluate and reward performance.** Evaluate results, dealing with questions of poor performance and rewarding those who did well.

## Additional Notes

**To Delegate or Not?** Many tasks can be delegated; some cannot. Tasks that should not be delegated are ones of a highly sensitive or political nature, including those that are confidential or could lead to interpersonal conflicts. You should handle these tasks yourself. Some examples: hiring, firing, promotions, or raises.

**Responsibility.** Even though you have delegated a task to someone else, you are still responsible for making sure the task is done on time and correctly. If the task fails, you can't point the finger. You delegated. It is your fault. You may have picked the wrong person for the job.

**Authority.** The amount of authority you delegate is up to you, although it should be enough to complete the task. It is no good giving Bob the task of opening the safe every morning if you do not give him the authority required to do it. Bob needs the key to open the safe.

## A Simple Quiz

(Distribute the "How Well Do You Delegate?" quiz from Handouts/Overheads at the end of this lesson plan.)

Ask the students to take a few minutes to take the simple quiz "How Well Do You Delegate?" Tell them that only they will see the results and to be honest with themselves when they answer the questions.

### Scoring Key

Give yourself one point for each:

"Yes" to Numbers 1, 2, 4, 6, 7, 11, 12, 14, 15

"No" to Numbers 3, 5, 8, 9, 10, 13

A good score is anything above 12.

After the students finish the quiz, have them score their answers, using the scoring key above. Ask them how they did. Do they need to practice delegating?

(Distribute the "Delegation Tips" handout from Handouts/Overheads at the end of this lesson plan.)

## Application

Here are some tips on how to delegate that you can use the next time you need to delegate. Ask the students to study the tips and then to write out a list of tasks they are currently doing that should be delegated to others. Have them list the person to whom they will delegate one of these tasks, what they will tell the person, and when it should be accomplished. Then go over these projected assignments with the students.

## **SIGNS OF TROUBLE**

You probably need to practice your delegating skills if you find yourself doing the following:

1. Constantly taking work home with you and/or working overtime
2. Not receiving work on time that you assigned to employees
3. Finding a pile of work awaiting you when you return from an absence
4. Making decisions without staff input, thus causing resentment



## STEPS TO ACCOMPLISH DELEGATION

1. Delegate the whole task to one person.
2. Select the right person.
3. Clearly specify your preferred results.
4. Delegate responsibility and authority.
5. Ask the employee to summarize the assignment you have just made to make certain you were understood.
6. Get ongoing nonintrusive feedback about progress on the project.
7. Maintain open lines of communication.
8. If you're not satisfied with the progress, don't immediately take the project back.
9. Evaluate and reward performance.

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9. **Evaluate and reward performance.** Evaluate results, dealing with questions of poor performance and rewarding those who did well.

## HOW WELL DO YOU DELEGATE?

Circle Yes or No for each question. Answer for your work, school organization, etc.

1.	Do you allow members of your organization to make mistakes?	Yes	No
2.	Do people in your organization receive recognition at least as frequently as other people with similar responsibilities in other organizations?	Yes	No
3.	Do you frequently stay up late or spend weekends working on organization matters?	Yes	No
4.	Does your organization function smoothly when you're not there?	Yes	No
5.	Do you spend more time in your organization working on minor details than you do on overall planning and supervision?	Yes	No
6.	Do other officers in your organization feel they have sufficient authority over matters assigned to them?	Yes	No
7.	When you make an assignment to someone, do you follow up to see that it gets done?	Yes	No
8.	Do you overrule or reverse decisions made by those under you?	Yes	No
9.	Do you bypass your organization's officers by making decisions that are part of their job?	Yes	No
10.	Do you do things that people should have done rather than waiting for them to do their job?	Yes	No
11.	If you were out sick for six months, is there someone who could readily take your place in your organization or at work?	Yes	No
12.	Do other officers in your organization delegate well to people under them?	Yes	No
13.	If you were on vacation for a month, would a lot of tasks be waiting for you when you returned to your organization or job?	Yes	No
14.	Do people working under you take the initiative in assignments without waiting for you to make all the decisions?	Yes	No
15.	When you delegate, do you specify the results you expect?	Yes	No

## DELEGATION TIPS

Effective delegation will not only give you more time to work on your important tasks, but you will also help others on your team learn new skills.

- Delegation helps people underneath you in an organization grow and thus pushes you even higher in management. It provides you with more time, and you will be able to take on higher-priority projects.
- Delegate whole pieces or entire jobs rather than simply tasks and activities.
- Clearly define what outcome is needed, then let individuals use some creative thinking of their own about how to get to that outcome.
- Clearly define limits of authority that go with the delegated job. Can the person hire other people to work with them? Are there spending constraints?
- Clear standards of performance will help people know when they are doing exactly what is expected.
- When on the receiving end of delegation, work to make your boss's job easier and to get the boss promoted. Assess routine activities in which you are involved. Can any of them be eliminated or delegated?
- Never underestimate a person's potential. Delegate slightly more than you think the person is capable of handling. Expect them to succeed, and you will be pleasantly surprised more frequently than not.
- Expect completed staff work from the individuals reporting to you. That is, they will come to you giving you alternatives and suggestions when a problem exists rather than just saying, "Boss, what should we do?"
- Do not avoid delegating something because you cannot give someone the entire project. Let the person start with a bite-size piece, then after learning and doing that, the person can accept larger pieces and larger areas of responsibility.
- Agree on a monitoring or measurement procedure that will keep you informed about progress on this project because you are ultimately still responsible for it and need to know that it is progressing as it should. In other words, if you can't measure it, don't delegate it.

From: Liraz Publishing Co.

# WORKSHOP LESSON PLAN ANALYSIS/EVALUATION

## Description

This session is an introduction to analysis and evaluation.

## Learning Objectives

After completing this session, the student should know:

- Basic analysis and evaluation principles
- The role of analysis and evaluation in leadership
- Various successful analysis and evaluation techniques

## Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Two overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of one handout reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student plus a few extras)

## Session Time Required

Approximately 50 minutes

## A Parable

(Display the “Let the Rabbits Run: A Parable” overhead from Handouts/Overheads at the end of this lesson plan. Ask one of the students to read the parable aloud.)

## Pursue One Strength

(Display the “Analysis/Evaluation” overhead and distribute the “Start With Your Strength” handout from Handouts/Overheads at the end of this lesson plan.)

Several qualities distinguish those who make spectacular achievements from others: good judgment, planning, determination, and the desire to succeed.

Achievers choose among their many talents and concentrate their efforts. In other words, when they find out what they do well, they do a lot of it.

Successful people spend a lot of time practicing things they are already good at so they get even better. This is why good guitarists get better—they practice. The same applies to athletes or outstanding students. Being smart or talented by itself will not guarantee accomplishment.

## People Are Not All Alike

However, to say that anyone can do anything assumes that all people are alike, possessing the same talents. This is false; each one of us is unique.

The winning coach of the Chinese Olympic ping-pong team said his team members spend eight hours a day practicing strengths. When this is done, strengths can overcome weaknesses. “Our winning player plays only his forehand. Even though his competition knows he can’t play backhand, his forehand is so invincible that it cannot be beaten.”

This same principle can help you as a leader by helping you concentrate on developing your strengths rather than spending time focusing on your weaknesses. Remember that people are always stronger when they have their successes and strengths clearly in mind.

Highly successful people have their own way of looking at things. If we want to understand greatness, we cannot spend our time studying the average. For example, the average coach defines

winning as getting the better score. The great coach defines winning as doing things right, moving toward overall perfection. On reviewing game tapes, Vince Lombardi said, “From now on, we only replay the winning plays.”

## How to Identify Strengths

A strength is a pattern of behavior (a thing we do, think, or feel) that we find highly satisfying, that results in an emotional or financial reward, and that moves us measurably toward achieving excellence.

Here are some signs of strengths:

**Listen for yearnings.** Each of us has yearnings that, like an internal magnet, pull us toward one thing (a strength) instead of another. This begins in early childhood and continues throughout life. It is important to remember that one’s life work very often begins with things we like to do in childhood.

**Watch for satisfactions.** Watch for things that you get a kick out of doing. That kind of satisfaction is not just a fleeting pleasure, but can be a good indicator of a strength. However, sometimes we are good at doing something, but don’t really enjoy it. In that case, it’s probably not a strength. Our strengths are associated with both our yearnings and our feelings of satisfaction.

**Watch for rapid learning.** If you catch on to something quickly, you’re probably good at it and will say, “I feel like I’ve always known how to do this.” A strength is something you learn easily and quickly and that you continue to improve on throughout your life.

**Glimpses of excellence.** Occasionally, we see signs of strength in brief glimpses of excellence within a performance, such as playing a musical instrument, giving a speech, dancing in a recital, or executing a particular play in a team sport. A performance is a series of moments that provide clues to greatness.

**Total performance for excellence.** When a performer repeatedly is able to achieve consistently good results while seemingly acting on “automatic”—without even having to think consciously about the various steps—that performer has gone

beyond showing mere glimpses of excellence to achieving excellence in the total performance.

## Manage Weaknesses

Some experts say that for every strength, we possess roughly 1,000 nonstrengths. This ratio says it's a huge waste of time to even try to fix all of our weaknesses.

Although weaknesses rarely change into strengths, we can learn to **MANAGE** them, making them irrelevant, while we develop our strengths. Therefore, if your best efforts in some area seem to be getting you nowhere, redirect your energy to a strength. Most weaknesses can't and don't need to be corrected.

**Loss of confidence.** We lose our motivation to try to do something when we find that we can't do it well. We lose interest and find excuses to avoid doing it.

**Lack of thinking.** When you're doing something you don't enjoy or at which you're not very good, you just want to get it over with. Your task consumes all your energy, and none remains for thinking about the future.

**Suffering burnout.** We experience resistance when doing something we're not good at. "I just can't do this anymore." Top producers report that pressure and stress often create more energy and renew motivation.

## Signs of Weaknesses

Weaknesses are things we do and thoughts we have that produce little satisfaction or pride and drain our resources. Weaknesses reduce productivity and lessen our self-esteem. Here are some signs of weaknesses:

**Feel defensive about performance.** Individuals focusing on weaknesses get defensive about how well they do. By contrast, people focusing on strengths meet challenges with a doubling of activity. Progress is the norm, not the exception.

**Develop obsessive behavior.** When the strengths normally used to pursue talents are concentrated on bolstering whatever we don't do well, we get minimal improvement despite intense focus. In contrast, working on strength, we can measure improvement and have a quick learning curve.

**Experience slow learning.** You just can't seem to "get it" no matter how hard you try. Slow learning so often indicates a weakness that it can't be dismissed with the notion that the person will get it someday.

**Repetition doesn't help.** Some people plod along; they get enough of the activity to be barely functional, but further repetition does not lead to measurable improvement.

**Skills do not become automatic.** In learning new things, we go through the steps consciously. In mastering a skill, the person talented in that area finds that steps become automatic. For the person weak in this area, they do not.

**Loss of self-confidence.** Motivation goes away when we can't do something well. We lose interest and find excuses to avoid doing those things.

**Want to get it over with.** You just want to get this over with. Your task consumes all your energy, and none is left for thinking about the future.

**Suffer burnout during practice.** We experience resistance when doing something we're not good at. "I just can't do this anymore." By contrast, pressure and stress often create more energy and renew motivation for those who are good at what they are doing.

## Useful Hints

Here are some useful ways to minimize the impact of weaknesses:

**Stop doing things.** Stop putting yourself in situations where you're forced to do something you don't do well. Continuing only depresses or angers you. Holding on to something that doesn't work only perpetuates a weakness that pulls energy away from strengths.

**Give it to someone else.** Be smart. Give the things you do poorly to someone else who's good at them. This frees you from the work as well as the worry and guilt that were byproducts of forcing yourself to do something you're not good at.

**Combine strengths.** Team up with someone and combine your joint strengths to create a unique capability that could not be achieved with one person alone.

**Find support systems.** If you wear glasses or use an alarm clock, you're already doing this. Similarly, find and use the tools that work best for you to manage your specific weaknesses. (Example: Use a calculator if you have difficulty doing figures in your head.)

**Try alternatives.** Find new and different ways to achieve your goals. If you think in pictures, draw your ideas for others instead of writing about them. Try taking a scenic way home instead of taking the shortest route.

## **Dramatic Changes**

Are we saying that people never change? Or that weaknesses are constant? Typically, yes. There are always exceptions, and dramatic transformations can take place. Finding ways to manage weaknesses is a better plan for most people. Once you find a way to manage a weakness, it frees wasted energy to focus on your strengths.

## **Prepare for Success**

Get ready for success by expecting it. When you know your strengths, you set appropriate goals that you are likely to achieve. But goals remain dreams until you share them with someone who cares about you. Your expectations for yourself get stronger when people around you share them.

Not everyone will share these expectations. Pick the people you share your expectations with carefully. An Olympic hopeful wants to pick the best coach available, one who believes in his ability to perform at Olympic levels. He would not consider retaining a coach who thought he did not have what it takes to win, even if the coach was top-notch.

When people's expectations of you are not in line with your own expectations of yourself, you feel resistance, fatigue, and stress because you feel it's impossible to meet those expectations. It's not that anyone is right or wrong; the expectations simply don't fit you. Nothing happens until someone expects something of you that you can achieve.

## **Something to Ponder**

If managing our weaknesses frees our strengths to overpower our weaknesses (ultimately making the weaknesses irrelevant), then does failure truly exist, or is it simply an inaccurate match of expectations and strengths?

Or could it be that people are not successes or failures, but simply are functioning in the right or wrong expectation environment?



## LET THE RABBITS RUN: A PARABLE

Some forest animals started a school to develop their children into well-rounded animals by teaching all of them running, swimming, hopping, and flying.

On the first day of school, the little rabbit excelled in hopping and running class, and he loved school because he got to do what he loved to do and was good at. When the rabbit went to swimming class, he was afraid of the water like all rabbits, so he did not swim well. In flying class, he could not get off the ground. He felt like a failure. When the other animals laughed at him, he felt even worse.

When he went home, he was pretty depressed. He told his parents he wanted to quit school. They told him to stick with it since his future success in life depended on mastering all these skills and getting his diploma. The next day, he asked the school counselor for help with his problems. To help him improve in his problem areas, the counselor put him in extra swimming and flying classes (which he hated) and canceled his running and hopping classes (which he loved)—This made him feel sick!

As he left the counselor's office, he met the wise old owl who said: "Life doesn't have to be this way. We could have schools and businesses where people are allowed to concentrate on what they do well."

(From *Soar With Your Strengths* by Donald O. Clifton and Paula Nelson)

## ANALYSIS/EVALUATION

Pursue one strength.

Focus on strengths; manage the weaknesses.

How to identify your strengths:

- Listen for yearnings.
- Watch for satisfactions.
- Watch for rapid learning.
- Glimpses of excellence.
- Total performance for excellence.

Find out what you do not do well and stop doing it.

Signs of weaknesses:

- Feel defensive about performance.
- Develop obsessive behavior.
- Experience slow learning.
- Repetition doesn't help.
- Skills do not become automatic.
- Loss of self-confidence.
- Want to get it over with.
- Suffer burnout during practice.

Strategies for managing weakness:

- Stop doing things.
- Give it to someone else.
- Combine strengths.
- Find support systems.
- Try alternatives.

# START WITH YOUR STRENGTH

## Pursue One Strength

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## START WITH YOUR STRENGTH (CONTINUED)

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## START WITH YOUR STRENGTH (CONTINUED)

### Prepare for Success

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# WORKSHOP LESSON PLAN

## BELIEFS AND VALUES

### Description

This session is an introduction to how beliefs and values affect a person's ability to lead.

### Learning Objectives

After completing this session, the student should understand:

- Basic principles of how beliefs and values affect leadership
- The role of people's beliefs and values in leadership
- Techniques for handling various value systems

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Two overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of four handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Personality Preferences

(Display the “Personality Preferences” overhead from Handouts/Overheads at the end of this lesson plan.)

One part of leadership is getting to know more about yourself, learning how you take in information and make decisions, and understanding the social and cultural environment in which you are most comfortable. Here are a few questions to start our discussion. I will read the question, then give possible replies that could be made by different people. Consider what your reply might be.

### In what ways do I interact with the world?

Examples: I become energized by being around people most of the time; I need to spend time alone; I need to think out loud; I need time to think to prepare answers before speaking; I pursue few interests in depth; I share personal information freely; etc.

**How do I take in information?** Example: I concentrate on what I can take in through my five senses (seeing, hearing, feeling, smelling, and tasting) and on what is real and concrete. Try turning this around: Consider imagination and thinking about meaning and consequences in a given situation.

**How do I make decisions?** Examples: I use logic and objective analysis; I make decisions based on my personal values and what is right for me and others; I prefer one standard for all with no exceptions; etc.

**What is my preferred environment?** Examples: I tend to live in an orderly way where life is structured and matters settled; I tend to live spontaneously with all kinds of possibilities; I am happier after decisions are made; I avoid closure; I try to understand life rather than control it; etc.

## Values

(Distribute the “Prioritizing Your Values” handout from Handouts/Overheads at the end of this lesson plan and have the students fill it out.)

It is important that you identify your personal values—how you feel about the things you choose to do and the contribution you make to the world around you. Most people who choose work that

agrees with their values say they feel satisfied and successful in their careers.

## Personality and Attitudes

(Distribute the “Personality Exercise” handout from Handouts/Overheads at the end of this lesson plan.)

Two of the most important factors in determining your happiness and success on a job or as part of an organization are your personality and attitudes. Assess your feelings and actions in different situations. Reflect on how they may differ, for example, in a large group versus one-on-one, or in a fast-paced versus a slow-paced environment. You are unique, having different tolerance levels than others for chaos, detail, and risk taking.

Evaluate who you really are now as a person and as a leader. Be honest when you judge your thoughts and feelings, your attitudes and behaviors. Now think a moment about the person and the kind of leader you would like to become. Think even more specifically about how it would feel to know that you had reached a level of excellence as a leader.

Then think about how you can begin to build excellence. Excellence as a leader is “being all you can be” within the limit of doing what is right for your organization. To reach that level of excellence you must first be a leader of good character. In other words, you must do everything you are supposed to do.

Character develops over time. Many think that much of character forms early in life. However, nobody knows exactly how much or how early character develops, but it is safe to claim that character does not change quickly.

Watching what people do tells you a great deal about their beliefs and values. People with strong character show drive, energy, determination, self-discipline, willpower, and nerve. They see what they want and go after it. They attract followers. On the other hand, people with weak character show none of these traits. They do not know what they want. They are disorganized, vacillate, and are inconsistent. They attract no followers.

A strong person can be good or bad. A gang leader is an example of a strong person with a

bad character, while an outstanding community leader is an example of a strong person with both strong and good characteristics. An organization needs leaders with strong and good characteristics, people who will guide them to the future and show that they can be trusted.

## Effective Leaders

(Distribute the “Beliefs, Values, Skills, Traits, and Attributes” handout from Handouts/Overheads at the end of this lesson plan.)

For you to be an effective leader, your people must have trust in you, and they have to be sold on your vision. In any organization, a leader’s actions set the pace. This behavior wins trust and loyalty and ensures the organization’s continued vitality. One of the ways to build trust is to display a good sense of character. Character is the disposition of a person, made up of beliefs, values, skills, and traits.

**Beliefs** are the deep-rooted convictions and assumptions that a person holds dear. These could be about people, concepts, or things. They could be beliefs about life, death, religion, what is good, what is bad, what is human nature, etc. Everything we read, see, or hear contributes to the development of our beliefs. Our beliefs cause us to value some things more than others. When our beliefs are based on lies, misunderstandings, or lack of experience, we may place the wrong value on things.

**Values** are attitudes about the worth of people, concepts, or things. For example, you might value a good car, home, friendship, personal comfort, or relatives. Values are important because they, in turn, determine the choices you make in your behavior. For example, if you value friendship more than time alone, you may accept an invitation out over an evening alone reading by the fireplace.

**Skills** are the knowledge and abilities you gain throughout life. The ability to learn a new skill varies with each individual. Some skills come almost naturally, while others come only by complete devotion to study and practice.

**Traits** are distinguishing qualities or characteristics of a person, while character is the sum total of these traits. There are hundreds of personality

traits; we will focus on a few crucial to leadership. To be a good leader you should be:

- **Honest.** Display sincerity, integrity, and candor in all your actions. Deceptive behavior will not inspire trust in your people.
- **Competent.** Your actions should be based on reason and moral principles. Do not make decisions based on childlike emotional desires or feelings.
- **Forward-looking.** Set goals and have a vision of the future. The vision must be shared by members of the organization. Effective leaders envision what they want and how to get it. They base their priorities on basic values.
- **Inspiring.** Display confidence in all that you do. By showing endurance in mental, physical, and spiritual stamina, you will inspire your people to reach for new heights. Take charge when necessary.
- **Intelligent.** Read, study, and seek challenging assignments.
- **Fair-minded.** Show fair treatment to all people. Prejudice is the enemy of justice. Display sensitivity to the feelings, values, interests, and well-being of others.
- **Broad-minded.** Seek out diversity.
- **Courageous.** Persevere until you accomplish a goal, regardless of seemingly insurmountable obstacles. Display a confident calm under stress.
- **Straightforward.** Use sound judgment to make good decisions at the right time.
- **Imaginative.** Make timely and appropriate changes in thinking, plans, and methods. Show creativity by thinking of new and better goals, ideas, and solutions to problems.

Ask the students to compare their personality attributes from the “Prioritizing Your Values” and “Personality Exercise” handouts to the traits of leadership in the “Beliefs, Values, Skills, Traits, and Attributes” handout.

Wait for students to compare their characteristics with the leadership character traits. You will notice that you have attributes and interests that will serve you well as a leader. You may need to improve your skills in some areas. It is important that you be aware of any beliefs you hold dear that

could hinder you when interacting with members of your organization.

## Types of Leaders

**Standard bearers.** These leaders live what they preach. Their daily commitment to ethical and fair treatment for those around them influences others to adopt the same standard throughout their organization. Being a standard bearer creates trust and openness in your employees, who in turn, fulfill your visions.

**Developers.** This type of leader helps others learn through teaching, training, and coaching. This creates an exciting place to work and learn. Never miss an opportunity to teach or learn something new yourself. Coaching suggests someone who cares enough to get involved by encouraging and developing others who are less experienced. Employees who work for developers know they can take risks and learn by making mistakes and winning in the end.

**Integrators.** These leaders orchestrate the many activities that take place throughout an organization by providing a view of the future and the ability to obtain it. Integrators have a sixth sense about where problems will occur and make their presence felt during those critical times. They know their employees do their best when they are left to work within a vision-based framework.

Organizations depend on leaders and followers. People will follow leaders if they believe in them—in their abilities, beliefs, and character.

## Closing

(Display the “The Image of Leadership” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout.)

## PERSONALITY PREFERENCES

What are your preferences in terms of the way you live in the world inside and outside yourself, the way you take in information and make decisions, and the type of environment in which you are most comfortable?

**In what ways do I interact with the world?** Examples: I become energized by being around people most of the time; I need to spend time alone; I need to think out loud; I need time to think to prepare answers before speaking; I pursue few interests in depth; I share personal information freely; etc.

**How do I take in information?** Example: I concentrate on what I can take in through my five senses (seeing, hearing, feeling, smelling, and tasting) and on what is real and concrete. Try turning this around: Consider imagination and thinking about meaning and consequences in a given situation.

**How do I make decisions?** Examples: I use logic and objective analysis; I make decisions based on my personal values and what is right for me and others; I prefer one standard for all with no exceptions; etc.

**What is my preferred environment?** Examples: I tend to live in an orderly way where life is structured and matters settled; I tend to live spontaneously with all kinds of possibilities; I am happier after decisions are made; I avoid closure; I try to understand life rather than control it; etc.

## PRIORITIZING YOUR VALUES

Consider the work values and definitions below. Circle those most important to you.

Ability utilization	Making use of learned skills and individual abilities
Achievement	Getting a feeling of accomplishment
Advancement	Having a chance for promotion and better pay
Affiliation	Belonging to a particular group or organization
Authority	Having co-workers ask me for advice and direction
Change and variety	Having the opportunity to do interesting, changing work
Community	Being involved in community affairs or volunteering
Compensation	Being paid well
Creativity	Creating new ideas, programs, or processes
Decision making	Having the power to decide courses of action, policies, etc.
Family	Being able to spend a lot of time with my family
Friendship	Developing personal relationships with my co-workers, getting along well
Help others	Helping other people in a direct way
Help society	Contributing to the betterment of society, the world
Independence	Having a large amount of freedom on the job, working without supervision
Influence	Being in a position to change attitudes or opinions of others
Intellectual status	Being an expert in a given field
Knowledge	Having an opportunity to pursue knowledge, truth, or understanding
Leisure	Enjoying a lot of free time, traveling, not having to work too long
Location	Living in a community that offers me a certain lifestyle

## PRIORITIZING YOUR VALUES (CONTINUED)

Moral responsibility	Living and working in accordance with a set of moral standards
Power	Controlling the work or direction of other people
Profit/gain	Being able to accumulate large amounts of money quickly
Public contact	Having a lot of day-to-day contact with people
Quality	Turning out high-quality work
Recognition	Being recognized for the quality of my work in some public way
Respect	Enjoying respect for me as a person
Security	Being assured of steady employment and reasonable pay
Stability	Having a routine, predictable, and lasting job
Supervision	Directing and being responsible for the work of others
Teamwork	Having close working relationships with co-workers
Time freedom	Having short and sporadic yet profitable assignments
Work under pressure	Working in situations where the quality and speed of my work are judged

From the circled values, list your five top values in order of their importance to you.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## PERSONALITY EXERCISE

Circle five traits that especially apply to you. Add to the list other traits that describe you. Check with your friends. Do they see you as you see yourself?

able to concentrate

enthusiastic

punctual

able to manage stress

friendly

quick

accurate

good-natured

quiet

adaptable

helpful

rational

adventurous

honest

realistic

aggressive

humorous

reflective

ambitious

imaginative

reliable

analytical

independent

reserved

assertive

intelligent

resourceful

attentive to detail

inventive

responsible

businesslike

kind

risk-taking

calm

likeable

self-confident

careful

logical

self-controlled

cheerful

mature

sensitive

clear-thinking

methodical

sincere

competent

meticulous

sociable

competitive

modest

stable

confident

motivated

supportive

conscientious

open-minded

tactful

conservative

optimistic

teachable

consistent

organized

tenacious

creative

outgoing

thorough

curious

patient

thoughtful

diplomatic

persevering

tough

discreet

persuasive

trusting

easygoing

poised

trustworthy

efficient

practical

understanding

emotional

precise

versatile

empathetic

progressive

witty



# BELIEFS, VALUES, SKILLS, TRAITS, AND ATTRIBUTES

For you to be an effective leader, your people must have trust in you, and they have to be sold on your vision. In any organization, a leader's actions set the pace. This behavior wins trust and loyalty and ensures the organization's continued vitality. One of the ways to build trust is to display a good sense of character. Character is the disposition of a person, made up of beliefs, values, skills, and traits.

**Beliefs** are the deep-rooted convictions and assumptions that a person holds dear. These could be about people, concepts, or things. They could be beliefs about life, death, religion, what is good, what is bad, what is human nature, etc. Everything we read, see, or hear contributes to the development of our beliefs. Our beliefs cause us to value some things more than others. When our beliefs are based on lies, misunderstandings, or lack of experience, we may place the wrong value on things.

**Values** are attitudes about the worth of people, concepts, or things. For example, you might value a good car, home, friendship, personal comfort, or relatives. Values are important because they, in turn, determine the choices you make in your behavior. For example, if you value friendship more than time alone, you may accept an invitation out over an evening alone reading by the fireplace.

**Skills** are the knowledge and abilities you gain throughout life. The ability to learn a new skill varies with each individual. Some skills come almost naturally, while others come only by complete devotion to study and practice.

**Traits** are distinguishing qualities or characteristics of a person, while character is the sum total of these traits. There are hundreds of personality traits; we will focus on a few crucial to leadership. To be a good leader you should be:

- **Honest.** Display sincerity, integrity, and candor in all your actions. Deceptive behavior will not inspire trust in your people.
- **Competent.** Your actions should be based on reason and moral principles. Do not make decisions based on childlike emotional desires or feelings.
- **Forward-looking.** Set goals and have a vision of the future. The vision must be shared by members of the organization. Effective leaders envision what they want and how to get it. They base their priorities on basic values.
- **Inspiring.** Display confidence in all that you do. By showing endurance in mental, physical, and spiritual stamina, you will inspire your people to reach for new heights. Take charge when necessary.

## BELIEFS, VALUES, SKILLS, TRAITS, AND ATTRIBUTES (CONTINUED)

- **Intelligent.** Read, study, and seek challenging assignments.
- **Fair-minded.** Show fair treatment to all people. Prejudice is the enemy of justice. Display sensitivity to the feelings, values, interests, and well-being of others.
- **Broad-minded.** Seek out diversity.
- **Courageous.** Persevere until you accomplish a goal, regardless of seemingly insurmountable obstacles. Display a confident calm under stress.
- **Straightforward.** Use sound judgment to make good decisions at the right time.
- **Imaginative.** Make timely and appropriate changes in thinking, plans, and methods. Show creativity by thinking of new and better goals, ideas, and solutions to problems.

### Types of Leaders

**Standard bearers.** These leaders live what they preach. Their daily commitment to ethical and fair treatment for those around them influences others to adopt the same standard throughout their organization. Being a standard bearer creates trust and openness in your employees, who in turn, fulfill your visions.

**Developers.** This type of leader helps others learn through teaching, training, and coaching. This creates an exciting place to work and learn. Never miss an opportunity to teach or learn something new yourself. Coaching suggests someone who cares enough to get involved by encouraging and developing others who are less experienced. Employees who work for developers know they can take risks and learn by making mistakes and winning in the end.

**Integrators.** These leaders orchestrate the many activities that take place throughout an organization by providing a view of the future and the ability to obtain it. Integrators have a sixth sense about where problems will occur and make their presence felt during those critical times. They know their employees do their best when they are left to work within a vision-based framework.

## THE IMAGE OF LEADERSHIP

A leader's a person, who commands much respect,  
 But due to the natures of all,  
 He's only as good as the image he casts  
 In the mirror that hangs on the wall.  
 He usually sees what he wants, and no more,  
 He's afraid to look deep in his soul.  
 He doesn't consider himself as at fault,  
 But wants others to help reach his goal.  
 When failures arise he blames it on all  
 Who failed to help or take part,  
 "They never did what they were told," he would say.  
 "They haven't the skill or the art."  
 What kind of a leader are you going to be—the kind who thinks he is the best?  
 Or will you be one of the very few greats who attributes success to the rest.  
 Don't fail to look at the help you received  
 From parents and friends all your life.  
 They comforted you, praised you and gave you the push  
 To help you through trouble and strife.  
 Another whose help you should never forget,  
 Who gave you your life and His love,  
 The One to whom all of our assets are known  
 Is the One whom we pray to above.  
 Be humble in all of your leadership traits.  
 Thank those who have made you so tall.  
 Be humane to others, consider them too,  
 Then smile through the glass on the wall.

—John Schoolland



# WORKSHOP LESSON PLAN

## DIVERSITY, CULTURE, AND CLIMATE

### Description

This session introduces high school students to leadership skills they need to be able to work effectively with people from diverse backgrounds.

### Learning Objectives

After completing this session, the student should have:

- A knowledge of basic principles for working with other cultures
- An understanding of the leader's role in promoting acceptance of cultural diversity
- Exposure to various successful multicultural teamwork techniques

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- One overhead transparency reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of two handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## What Is Diversity?

(Display the “How We Tend to Categorize People” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout.)

Tell students: Diversity includes not only racial, gender, religious and cultural differences; it also includes the diversity of every individual—slow learner and fast learner, introvert and extrovert, scholar and athlete, liberal and conservative. Diversity touches the very fabric of our everyday lives.

We need to help people realize the need for a wide variety of people in society and in our organizations if we are to become the best that we can be. It is important for leaders to learn to draw on the talents of every person on their team—no matter how different that person may be. Distrust and infighting have no place in any well-run organization today.

An organization needs the skills of all its team members—the dreamer and the doer, the researcher and the salesperson, the organizer and team builders—if it is to achieve its best. Diversity is the key to success. Without it, most organizations flounder. For example, having a group that only includes people good at organizing will get you nowhere, as everyone will be trying to do things their way. Likewise, having a group composed only of followers will get you nowhere, as everyone will be waiting for someone else to get things started.

Diversity goes beyond differences of race, gender, religion, and age to include the very differences of individuals that make each one of us unique. Only when people and organizations have learned to value the uniqueness of all individuals will groups and organizations move closer to achieving success by drawing on all the strengths of their team members.

## How We Categorize People

Divide the class into small groups of about four learners to a group and issue each group a flip chart and markers.

Each group will make two flip charts. One will be titled “Physical Characteristics of People” and the

other will be titled “Dress and Personal Adornment of People.”

Each group should list as many things as they can think of in their category that would hinder an individual’s acceptance or progress within an organization. Some possible answers are suggested below.

### Physical Characteristics:

- Too tall/short
- Too heavy/skinny
- Too young/old
- Disfigured
- Lacking “good looks”
- Other features that are less desirable than social or cultural norms

### Dress and Personal Adornment:

- Dresses out of fashion
- Body piercing
- Hair length
- Informal dress
- Expression of cultural, ethnic, religious, generational, or personal standard

After the small groups have worked on the activity for about 15 minutes, bring the groups together and have each group present their findings.

## Impact of Norms

Lead a discussion of what is fair and legitimate to ask of people when it comes to norms about physical characteristics and appearances. Some topics might include:

- Ability to do the job
- Impact on customers
- Safety requirements
- Loss of good personnel because of bias

(Distribute the “Behaviors Essential to Quality Relationships” handout from Handouts/Overheads at the end of this lesson plan.)

Tell the students, “Let’s see how each of us relates to other people. Take a few minutes to complete this questionnaire. Be honest with yourself. Only you will see the result of your quiz.” After the students are finished, continue the discussion.

“Look over your quiz. What areas did you mark as needing improvement? Each of us has things we need to work on if we are going to improve our ability to interact with others. Remember that your ability to get along with all types of people is one of the most important skills of being a good leader. You will want to spend some time working to improve those areas where you marked yourself as weak.”

## Important Challenge

One of the great challenges facing organizations is getting all members to realize that they have to embrace diversity if the organization—as well as its individual members—is to achieve its best.

Diversity is about empowering people. It makes an organization effective by drawing on the strengths of all its members—not just the ones who fit some so-called “norm.” Diversity is also learning to understand, value, and use the differences that make people unique.

To obtain the competitive edge you need to create great teams, you must use the full potential of every individual. Teams are much more than a collection of individuals working toward their own individual goals. A team is a group of individuals working toward a common goal under the leadership of a person with vision.

## Synergy Effect

This unity of purpose creates a synergy effect, a situation in which the team working together can accomplish more than all of its members could collectively if they were working alone. In other words, when working as a team, one plus one equals more than two.

An individual acting alone can accomplish much, but a group of people acting together in a unified force can accomplish great wonders. This happens because team members understand and support each other. Their main focus remains on common, rather than personal, goals.

A good leader is able to use this synergy effect of teams to create a competitive advantage over other organizations whose members are not unified in common purpose. But prejudices and biases against individuals can get in the way of creating this unified purpose.

When people are rejected by team members on the basis of prejudice and bias, the talents of those people will not be available for the team to draw upon. And those individuals may be the very people who have the talents the team needs. Hence, the team effort will fail.

## Embrace Diversity

Embracing diversity is the first rule for building a winning team. Every team-building theory agrees that there must be a wide pool of people with different talents if a team is to succeed. Choosing people like you to be on teams is similar to inbreeding—everyone shares the same flaws.

Diversity is what builds a team. My weakness is your strength. My strength is someone else’s weakness. A team will not be built if every member of the team does not embrace diversity.

Our biases and prejudices are deeply rooted within us. From the moment we are born, we learn about our environment, the world, and ourselves. Families, friends, music, movies, television, videos, books, teachers, and others influence our ideas about what is right and what is wrong. Not all of these influences are good. Sometimes we learn other people’s bad attitudes toward others.

These early influences—good and bad—shape us and influence how we perceive and interpret later experiences. We make assumptions (prejudgments without full information) on the basis of what we have learned in the past. Sometimes, these prejudgments (or “biases”) are good because they allow us to react quickly, such as when we assume that a man pointing a gun at us may be “bad.”

But biases can be bad. Research has shown that sometimes they act as filters, letting in only information that fits with our existing beliefs while ignoring or reinterpreting new information so as to ignore it.

If, for example, we have a prejudice that says athletes cannot be scholars, we may react to the fact that the football captain made straight A’s by saying, “He just got lucky on the tests.” When our biases keep us from seeing the potential capabilities of others, they become extremely harmful to our own personal development as people and as

potential leaders. They become something we must work to change.

If we do not change, then as leaders we will overlook and ignore people whose skills are needed by our team or group. Embracing diversity is more than merely tolerating people who are different. It means actively welcoming them and involving them by creating an atmosphere in which it is safe for all people to ask for help. People should not be viewed as weak if they ask for help. This is what helps us build great teams: joining weakness and strengths in common purpose.

As leaders, we need to seek information from a wide variety of people from different backgrounds and cultures. We also need them deeply involved in problem solving and decision making. One way to begin this process of encouraging acceptance of diversity is to seek out people different from you in informal gatherings such as lunch, snack breaks, and spur-of-the-moment meetings. This helps create a team spirit in which every member is included and welcome.

If an organization does not take on this challenge, it will soon be left far behind. There are just too many other groups eagerly seeking diversity so they can become the best by using the talents of all kinds of people. They know they cannot afford to overlook talents just because they exist in someone that others consider “different.”

## Celebrate Achievement

Great organizations that want to remain competitive are not content to sit around patting themselves on the back, for they know there are dozens of others that want to take their place. They do, however, create an atmosphere that celebrates achievement. This helps members know what success looks like.

When tough goals are only partly met, it is also important to celebrate. Setting a difficult goal and not reaching it is far more important than meeting a mediocre goal. Striving to achieve a difficult goal provides learning experiences that cannot be taught in training classes. It reinforces the need to draw upon the widest range of talent possible. People learn that prejudice and bias get in the way of reaching the common goal.



# HOW WE TEND TO CATEGORIZE PEOPLE

Member Characteristics	Personal Characteristics	Traditional Differences and Characteristics
Seniority	Sexual orientation	Race
Position level	Physical status	Gender
Experience	Ethnic background	Age
Education	Religious background	
Training	Club associations	
Leader	Socioeconomic status	
Non-leader	Place of birth	
	Culture	
	Experiences	
	Married or single	

## BEHAVIORS ESSENTIAL TO QUALITY RELATIONSHIPS

Listed below are a number of behaviors that are essential to relating to others. Rate yourself on these behaviors using the following scale:

Very Weak    1    2    3    4    5    6    7    8    9    Very Strong

Note: A rating of five means you would consider yourself a resource person (if only minimally so). That is, in a relationship or group, you would be a giver rather than just a receiver.

1. \_\_\_\_\_ **Feelings.** I am not afraid to deal directly with emotion—mine or other people's. I allow myself to give expression to what I feel.
2. \_\_\_\_\_ **Initiative.** In my relationships, I act rather than react by seeking people out rather than waiting for them to seek me out.
3. \_\_\_\_\_ **Respect.** I express respect for others even if I do not necessarily agree with them on stands they take.
4. \_\_\_\_\_ **Genuineness.** I do not hide behind a “mask.” I let others know clearly where I stand on issues.
5. \_\_\_\_\_ **Concreteness.** I am not vague when I speak to others. I get to the point quickly and then use specific examples to illustrate that point.
6. \_\_\_\_\_ **Immediacy.** I deal openly and directly with others. I know where I stand with others, and they know where they stand with me.
7. \_\_\_\_\_ **Empathy.** I see the world through the eyes of others by actively listening to cues, both verbal and nonverbal, and I respond to these cues.
8. \_\_\_\_\_ **Confrontation.** I do not use confrontation to punish, but try instead to challenge others responsibly and with care.
9. \_\_\_\_\_ **Self-disclosure.** I let others know the person inside, but do not try to focus all the attention on myself or my own needs.
10. \_\_\_\_\_ **Self-exploration.** I examine my lifestyle and behaviors and want others to help me do so.

**Scoring.** There are no correct or incorrect scores. This assessment simply shows you where you stand in your relations with others. Your goal should be to work on the lowest scoring of the 10 behaviors. Have one or two others rate you for comparison.

# WORKSHOP LESSON PLAN

## CHARACTER OF LEADERSHIP

### Description

This session introduces high school students to character ethics.

### Learning Objectives

After completing this session, the student should know:

- Basic character ethics principles
- The role of ethical decisions in leadership
- Various successful character ethics techniques

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Two overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of two handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## What Is Character?

Ask the students to define character. Write their answers on a flip chart pad or chalkboard and display them in the front of the room.

(Display the “Definition of Character” overhead from Handouts/Overheads at the end of this lesson plan.)

## Character of Leaders

Ask students to name some character traits of good leaders. Write their answers on a flip chart or chalkboard for all to see.

You don’t inherit good character or the ability to lead. Nor can anyone give you the character traits to be a good leader. You acquire leadership potential by taking an honest look at yourself. What are your strengths of character? Which of the traits that we listed for leaders do you possess? Which do you lack?

Organizations seek good leaders regardless of whether the organization in question is the student council, a Learning for Life group, or a business. If you work at acquiring those skills needed to be a good leader, you will find that you (1) accomplish your goals as a leader and (2) have the willing obedience, confidence, loyalty, and respect of your team. In fact, you will have lived up to the definition of a leader.

(Display the “14 Leadership Character Traits” overhead and distribute the “14 Character Leadership Traits” handout from Handouts/Overheads at the end of this lesson plan.)

## 14 Character Traits

The military services have a list of 14 character traits they say define good leaders. Compare this list with our earlier list you suggested. How many of the traits are the same?

Let’s look closely at each trait. As we consider each of these traits, ask yourself whether it applies only to military leaders or to other types of leaders, as well. Then rate yourself on this character trait.

**Integrity.** One synonym is honesty. Do you want a leader known to lie? Do others? Of course not. If you want to win people’s trust, make sure you always speak the truth. When you give your word,

keep it. People will come to believe you are a person who can be believed.

**Knowledge.** Leaders know their jobs. They know how to use any equipment needed on the job and have the ability to train others. People can spot people who fake it. If you don’t know something, admit it. Then find out. Good leaders also know the people under them—whose performance is high and whose needs closer supervision.

**Courage.** This trait comes in two kinds: physical and moral. If you are in a tight place and feel fear, learn to make it work for you. Remember that fear stimulates the body processes while preparing you for a fight. Fix your mind on your goal, and then take some action. Courage grows with action, even if it turns out not to have been the very best decision. At least you will not have let your fear overwhelm you as a leader.

As for moral courage, know what’s right and stand up for it. People who don’t will never command the loyalty and respect of others. A leader must also be a moral leader. When you’re wrong, say so. Don’t try to weasel out of your mistake. Accept full responsibility. Everybody makes a mistake now and then. The trick is not to make the same one twice.

**Decisiveness.** Get all the facts before you make a decision. Being decisive doesn’t mean making quick judgments without facts. After you’ve weighed all the facts, give your decision in clear, confident terms. Don’t confuse people by debating with yourself out loud. If you don’t have the authority or responsibility to make a particular decision, take the problem to the person who does.

**Dependability.** If only one word could be used to describe good leaders, that word would have to be “dependable.” Dependable leaders are always on time, never make excuses, and stay on the job until it’s done, regardless of obstacles. They often make personal sacrifices. During decision making, they state their ideas clearly and tactfully if they disagree with others above them. But once a decision is made, they put their disagreement aside and work to complete whatever assignment they receive.

**Initiative.** Think ahead. Stay mentally alert and physically awake. Look around. If you see a job that needs to be done, don't wait to be told. Your situation and the lot of others can always be improved. Do what you can. Use the means at hand. Think ahead, and you'll stay ahead!

**Tact.** Tactful leaders are fair, firm, and friendly. They respect others by showing them courtesy—whether they are people above them or below them in authority. If a person needs to be corrected, tactful leaders do so in private. If a person deserves praise, it is given in public. Tactful leaders follow the Golden Rule, treating others as they would wish to be treated.

**Justice.** People like a leader who plays fair. Don't play favorites. Spread the rewards and the work around equally. Keep anger and emotions out of your decisions. Get rid of any narrow-mindedness or biases that get in the way of true leadership. Judge people by what they do. Help those who fall short of your standards, but keep your standards high.

**Enthusiasm.** People will follow leaders who are enthusiastic and knowledgeable about their jobs. Show knowledge and enthusiasm about a subject, and your team will want that same knowledge. Show your dislikes and gripe about what's going on and you'll still be leading—but in the wrong direction. The choice is yours. Make the right one.

**Bearing.** Conduct yourself so you look and act like a leader. Dress the part and learn to control your looks and gestures. A calm voice and a steady hand are confidence builders when it gets rough. Speak plainly and simply. Remember that your goal is to be understood rather than to impress. Don't lose your temper or control of your tongue. If you do, you'll lose the respect of those under you.

**Endurance.** A five-foot team leader once led his men through 10 days of field training. He topped it off with a two-day hike 36 miles back to camp. When asked how a man of his size developed such endurance, he said: "It was easy. I had 12 guys pushing me all the way." What he meant, of course, was that 12 others were dependent on his endurance to pull them through. He couldn't think about quitting. All leaders must have endurance beyond that of their subordinates. Team leaders must check everyone's work in addition to doing their own.

**Unselfishness.** Good leaders are not selfish. They put the interest and needs of those under them ahead of their own private interests. They give credit where credit is due, and they don't grab the glory for themselves. They make certain that recognition for hard work and good ideas goes to team members.

**Loyalty.** This is a two-way street. It goes all the way up and down the line. You should live by it. Back your team when they're right. Correct them when they're wrong. You're being loyal either way. Keep your personal problems and the private lives of others to yourself. But help your people in their difficulties when it is proper to do so. Never criticize your team or your boss in the presence of subordinates. Make sure they don't do it either. If your people get into trouble, go to bat for them if they deserve for you to do so. They'll work harder when it's all over.

**Judgment.** This comes with experience. It is simply weighing all the facts in any situation, applying the other 13 traits you have just read about, then making the best move. Until you acquire experience, you may not know the best move. What should you do in the meantime? Well, there are hundreds of years of experience out there. Ask someone with experience for advice. You will be surprised how often others will be glad to help.

## Closing

This is all well and good for the military, but how does it apply to business in general?

(Distribute the "Lockheed Martin: Our Value Statements" handout from Handouts/Overheads at the end of this lesson plan.)

Take a look at the mission statement of the large aerospace firm Lockheed Martin. Ask the students, "Can you find where it mentions any of the same leadership traits?"

Wait for the students to suggest where the traits appear in the mission statement.

It should be apparent that character is important to the leadership and membership of every organization, whether it be a student club, a business, a military unit, or a government bureau. If you want to be a good leader, you need to continue to develop the traits that all good leaders share.

## DEFINITION OF CHARACTER

char·ac·ter n.

1. The combination of qualities or features that distinguishes one person, group, or thing from another.
2. A distinguishing feature or attribute, as of an individual, a group, or a category.
3. Moral or ethical strength.
4. A description of a person's attributes, traits, or abilities.
5. Public estimation of someone; reputation: personal attacks that damaged his or her character.
6. Law. Of or relating to a person who gives testimony as to the moral and ethical reputation or behavior of one engaged in a lawsuit: a character witness.

American Heritage Dictionary, Third Edition

## **14 LEADERSHIP CHARACTER TRAITS**

1. Integrity
2. Knowledge
3. Courage
4. Decisiveness
5. Dependability
6. Initiative
7. Tact
8. Justice
9. Enthusiasm
10. Bearing
11. Endurance
12. Unselfishness
13. Loyalty
14. Judgment

## 14 LEADERSHIP CHARACTER TRAITS

1. **Integrity.** One synonym is honesty. Do you want a leader known to lie? Do others? Of course not. If you want to win people's trust, make sure you always speak the truth. When you give your word, keep it. People will come to believe you are a person who can be believed.
2. **Knowledge.** Leaders know their jobs. They know how to use any equipment needed on the job and have the ability to train others. People can spot people who fake it. If you don't know something, admit it. Then find out. Good leaders also know the people under them—whose performance is high and whose needs closer supervision.
3. **Courage.** This trait comes in two kinds: physical and moral. If you are in a tight place and feel fear, learn to make it work for you. Remember that fear stimulates the body processes while preparing you for a fight. Fix your mind on your goal, and then take some action. Courage grows with action, even if it turns out not to have been the very best decision. At least you will not have let your fear overwhelm you as a leader.  
  
As for moral courage, know what's right and stand up for it. People who don't will never command the loyalty and respect of others. A leader must also be a moral leader. When you're wrong, say so. Don't try to weasel out of your mistake. Accept full responsibility. Everybody makes a mistake now and then. The trick is not to make the same one twice.
4. **Decisiveness.** Get all the facts before you make a decision. Being decisive doesn't mean making quick judgments without facts. After you've weighed all the facts, give your decision in clear, confident terms. Don't confuse people by debating with yourself out loud. If you don't have the authority or responsibility to make a particular decision, take the problem to the person who does.
5. **Dependability.** If only one word could be used to describe good leaders, that word would have to be "dependable." Dependable leaders are always on time, never make excuses, and stay on the job until it's done, regardless of obstacles. They often make personal sacrifices. During decision making, they state their ideas clearly and tactfully if they disagree with others above them. But once a decision is made, they put their disagreement aside and work to complete whatever assignment they receive.
6. **Initiative.** Think ahead. Stay mentally alert and physically awake. Look around. If you see a job that needs to be done, don't wait to be told. Your situation and the lot of others can always be improved. Do what you can. Use the means at hand. Think ahead, and you'll stay ahead!
7. **Tact.** Tactful leaders are fair, firm, and friendly. They respect others by showing them courtesy—whether they are people above them or below them in authority. If a person needs to be corrected, tactful leaders do so in private. If a person deserves praise, it is given in public. Tactful leaders follow the Golden Rule, treating others as they would wish to be treated.



## 14 LEADERSHIP CHARACTER TRAITS (CONTINUED)

8. **Justice.** People like a leader who plays fair. Don't play favorites. Spread the rewards and the work around equally. Keep anger and emotions out of your decisions. Get rid of any narrow-mindedness or biases that get in the way of true leadership. Judge people by what they do. Help those who fall short of your standards, but keep your standards high.
9. **Enthusiasm.** People will follow leaders who are enthusiastic and knowledgeable about their jobs. Show knowledge and enthusiasm about a subject, and your team will want that same knowledge. Show your dislikes and gripe about what's going on and you'll still be leading—but in the wrong direction. The choice is yours. Make the right one.
10. **Bearing.** Conduct yourself so you look and act like a leader. Dress the part and learn to control your looks and gestures. A calm voice and a steady hand are confidence builders when it gets rough. Speak plainly and simply. Remember that your goal is to be understood rather than to impress. Don't lose your temper or control of your tongue. If you do, you'll lose the respect of those under you.
11. **Endurance.** A five-foot team leader once led his men through 10 days of field training. He topped it off with a two-day hike 36 miles back to camp. When asked how a man of his size developed such endurance, he said: "It was easy. I had 12 guys pushing me all the way." What he meant, of course, was that 12 others were dependent on his endurance to pull them through. He couldn't think about quitting. All leaders must have endurance beyond that of their subordinates. Team leaders must check everyone's work in addition to doing their own.
12. **Unselfishness.** Good leaders are not selfish. They put the interest and needs of those under them ahead of their own private interests. They give credit where credit is due, and they don't grab the glory for themselves. They make certain that recognition for hard work and good ideas goes to team members.
13. **Loyalty.** This is a two-way street. It goes all the way up and down the line. You should live by it. Back your team when they're right. Correct them when they're wrong. You're being loyal either way. Keep your personal problems and the private lives of others to yourself. But help your people in their difficulties when it is proper to do so. Never criticize your team or your boss in the presence of subordinates. Make sure they don't do it either. If your people get into trouble, go to bat for them if they deserve for you to do so. They'll work harder when it's all over.
14. **Judgment.** This comes with experience. It is simply weighing all the facts in any situation, applying the other 13 traits you have just read about, then making the best move. Until you acquire experience, you may not know the best move. What should you do in the meantime? Well, there are hundreds of years of experience out there. Ask someone with experience for advice. You will be surprised how often others will be glad to help.

# LOCKHEED MARTIN: OUR VALUE STATEMENTS

## Ethics

We will be well-informed in the regulations, rules, and compliance issues that apply to our businesses around the world. We will apply this knowledge to our conduct as responsible employees of Lockheed Martin, and will adhere to the highest standards of ethical conduct in all that we do.

## Excellence

The pursuit of superior performance infuses every Lockheed Martin activity. We excel at meeting challenging commitments even as we achieve total customer satisfaction. We demonstrate leadership by advancing new technologies, innovative manufacturing techniques, enhanced customer service, inspired management, and the application of best practices throughout our organization. Each of us leads through our individual contributions to Lockheed Martin's core purpose.

## "Can-Do"

We demonstrate individual leadership through a positive approach to every task, a "can-do" spirit, and a restless determination to continually improve upon our personal bests. We aggressively pursue new business, determined to add value for our customers with ingenuity, determination and a positive attitude. We utilize our ability to combine strength with speed in responding enthusiastically to every new opportunity and every new challenge.

## Integrity

Each of us brings to the workplace personal values that guide us to meet our commitments to customers, suppliers, colleagues, and others with whom we interact. We embrace truthfulness and trust, and we treat everyone with dignity and respect—as we wish to be treated ourselves.

## People

Outstanding people make Lockheed Martin unique. Success in rapidly changing markets requires that we continuously learn and grow as individuals and as an organization. We embrace lifelong learning through individual initiative, combined with company-sponsored education and development programs, as well as challenging work and growth opportunities.

## LOCKHEED MARTIN: OUR VALUE STATEMENTS (CONTINUED)

### Teamwork

We multiply the creativity, talents, and contributions of both individuals and businesses by focusing on team goals. Our teams assume collective accountability for their actions, share trust and leadership, embrace diversity, and accept responsibility for prudent risk-taking. Each of us succeeds individually . . . when we as a team achieve success.



# WORKSHOP LESSON PLAN

## ETHICS OF LEADERSHIP

### Description

This session introduces the ethics of leadership.

### Learning Objectives

After completing this session, the student should know:

- Basic principles of ethical leadership
- The role of ethical decision making in leadership
- Various techniques for making ethical decisions

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- One overhead transparency reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of four handouts reproduced from Handouts/Overheads at the end of this lesson plan
  - “Ethics of Leadership”: one copy for each student
  - “Whose Property,” “Position One,” and “Position Two”: one copy for every two students

### Session Time Required

Approximately 50 minutes

## Definition of Ethics

(Display the “Definition of Ethics” overhead from Handouts/Overheads at the end of this lesson plan and distribute the “Ethics of Leadership” handout.)

Tell students: What do we mean when we talk about ethics? Turning to the dictionary, we find the following definition:

### ethics

1. a. A set of principles of right conduct.  
b. A theory or a system of moral values.
2. ethics. (used with a sing. verb) The study of the general nature of morals and of the specific moral choices to be made by a person; moral philosophy.
3. ethics. (used with a sing. or pl. verb) The rules or standards governing the conduct of a person or the members of a profession: medical ethics.

Tell the students, “Just about every organization has some type of code of ethics. We hear about business ethics, media ethics, and family values. However, ethical behavior means more than knowing and following the code of a particular business. For example, what does it mean to you to talk about ethical leadership?”

Write students’ answers on a flip chart or chalkboard.

## Leadership Ethics

When we think about leadership ethics, we tend to tie it to so-called great men and women of history and often link it to some sort of heroic conduct.

According to Ronald W. Roskens, president of the University of Nebraska, ethical leadership includes “a respect for self, and others; a willingness to sacrifice for the common good; a sense of civic responsibility; the relentless pursuit of truth; basic honesty; and an intolerance for anything less than adherence to the highest standards.”

True leaders have earned the respect and allegiance of others. “Ethical leaders discern that the fabric with which they work is a multi-hued tapestry, and that the individual threads are woven from value-laden materials” (Roskens). He adds

that leaders’ accomplishments are not just personal, but involve other people. When individuals serve, they apply their individual efforts to the pursuit of the common good.

## Ethical Leaders

As an organization leader, you must treat all individuals as though they are future leaders. By finding ways to let members participate in leadership, you allow them to grow and to gain invaluable skills and perspectives necessary for the pursuit of excellence.

Good leaders know how to value the individual. As columnist Sydney Harris once wrote, “The good person loves people and uses things; the evil loves things and uses people.” As leader, you should try to make group members feel they are a valuable part of a team rather than just another face in the crowd.

Share the spotlight of leadership with fellow officers and members. Ethical leaders do not let their egos get out of hand. They know how to shift the focus onto teamwork.

Don’t be a fact hog. Share information with the rest of the members of your group or organization. Creating a successful organization requires teamwork. Knowledge may provide a sense of power, but your organization will not succeed if you do not share information.

Do not bad-mouth or gripe about other officers, members, or your organization advisers. If there is a problem, meet with the people involved and discuss it. Your fellow officers or members may be unaware of your concerns.

Consider having your organization members sign an honor code. Establishing a code of conduct or ethics for your members can reduce confusion if ethical dilemmas arise.

Leaders need to set the example of ethical behavior by showing they are persons of character. Treat members fairly and encourage members to do the same. By doing so, you will be showing them you are sincere, trustworthy, and have their best interests at heart. More important, you will be helping them develop their own character.

As you serve your organization, strive for the common good. Not only will the organization

benefit, but you will find yourself growing in your leadership abilities as well.

## Character Education Activity

Character Education Activities are dilemmas for which apparently legitimate arguments exist for opposing positions. Discussing these dilemmas provides opportunities for critical thinking, respectful disagreement, cooperative effort, and understanding others' beliefs.

Divide the participants into groups of four. (If you cannot form all groups of four, some groups of five will do.) Divide each group of four into two pairs of two.

Give one pair a copy of the dilemma and the pro position statement (the "Whose Property?" and "Position One: Improve the Software" handouts). Give the other pair in the group a copy of the dilemma and the con position statement (the "Whose Property?" and "Position Two: Keep It a Secret" handouts).

There are five simple steps in this character education activity. Describe and conduct one step at a time. Allow enough time to complete each step before moving on. All groups of four should work on each step at the same time.

1. Explain to the students that each will work with a partner on developing as many arguments as possible to support their assigned position. If they like, they can also work with a pair from another group that has the same topic and position.

(Students work on their position arguments.)

2. The first pair should briefly explain its argument to the second pair. After hearing the argument, the second pair should restate it to verify that they have understood it correctly. Then the second pair should explain its position, etc.

(Students present their positions to the other pair in their group.)

3. Students should take turns explaining the reasons for their position, trying to persuade the opposing team why they are right. They should also critique the argument of the opposing team. Remember to be critical of ideas, not people.

(Students discuss the various positions.)

4. Now, the teams should switch positions and argue for the opposite side. Allow students to take a few minutes to review their new position. Tell the students to present and defend their new position as if they really believed in it.

(Students prepare to argue the other side of the dilemma, and then present the other position.)

5. Finally, all four in each group should work toward finding a position that they really believe is the correct one. This may be one of those presented or a completely new one. Students should change their minds only when convinced by rational argument.

(Students come to a consensus on the dilemma.)

Ask each group of four how they arrived at their final position. Compare the different positions and the different arguments used to support them.

## DEFINITION OF ETHICS

### ethics

1. a. A set of principles of right conduct.  
b. A theory or a system of moral values.
2. ethics. (used with a sing. verb) The study of the general nature of morals and of the specific moral choices to be made by a person; moral philosophy.
3. ethics. (used with a sing. or pl. verb) The rules or standards governing the conduct of a person or the members of a profession: medical ethics.

American Heritage Dictionary, Third Edition



# ETHICS OF LEADERSHIP

## The Ethical Organization Leader

As an organization leader, you must treat all individuals as though they are future leaders. By finding ways to **let members participate in leadership**, you allow them to grow and to gain invaluable skills and perspectives necessary for the pursuit of excellence.

Good leaders know how to **value the individual**. As columnist Sydney Harris once wrote, “The good person loves people and uses things; the evil loves things and uses people.” As leader, you should try to make group members feel they are a valuable part of a team rather than just another face in the crowd.

**Share the spotlight of leadership** with fellow officers and members. Ethical leaders do not let their egos get out of hand. They know how to shift the focus onto teamwork.

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**Do not bad-mouth or gripe** about other officers, members, or your organization advisers. If there is a problem, meet with the people involved and discuss it. Your fellow officers or members may be unaware of your concerns.

Consider having your organization members **sign an honor code**. Establishing a code of conduct or ethics for your members can reduce confusion if ethical dilemmas arise.

Leaders need to **set the example** of ethical behavior by showing they are persons of character. Treat members fairly and encourage members to do the same. By doing so, you will be showing them you are sincere, trustworthy, and have their best interests at heart. More important, you will be helping them develop their own character.

As you serve your organization, **strive for the common good**. Not only will the organization benefit, but you will find yourself growing in your leadership abilities as well.

## WHOSE PROPERTY?

Derek Evans used to work for a small computer firm (Company A) that specializes in developing software for management tasks. Derek was a primary contributor in designing an innovative software system for customer services. This software system is essentially the lifeblood of the firm. Company A never asked Derek to sign an agreement that software designed during his employment there becomes the property of the company. However, his new employer did. Derek is now working for a much larger computer firm (Company B). Derek's job is in the customer service area, and he spends most of his time on the telephone talking with customers who are having systems problems. This requires him to cross-reference large amounts of information. It now occurs to him that by making a few minor alterations in the innovative software system he helped design at Company A, the task of cross-referencing can be greatly simplified.

On Friday, Derek decides he will come in early Monday morning to make the adaptation. However, on Saturday evening he attends a party with two of his old friends, you and Horace Jones. Since it has been some time since you have seen each other, you spend some time discussing what you have been doing recently.

Derek mentions his plan to adapt the software system on Monday. Horace asks, "Isn't that unethical? That system is really the property of Company A." "But," Derek replies, "I'm just trying to make my work more efficient. I'm not selling the system to anyone, or anything like that. It's just for my use—and, after all, I did help design it. Besides, it's not exactly the same system—I've made a few changes." What follows is a discussion among Horace, Derek, and you. What is your contribution?

Derek installs the software Monday morning. Soon everyone is impressed with his efficiency. Others are asking about the secret of his success. Derek begins to realize that the software system might well have companywide adaptability. This does not go unnoticed by his superiors.

So he is offered an opportunity to introduce the system in other parts of the company. Now Derek recalls the conversation at the party, and he begins to wonder if Horace was right after all. He suggests that his previous employer be contacted and that the more extended use of the software system be negotiated with the small computer firm. This move is firmly resisted by his superiors, who insist that the software system is now the property of Company B. Derek balks at the idea of going ahead without talking with the smaller firm (Company A). If Derek doesn't want the new job, they reply, someone else can be invited to do it; in any case, the adaptation will be made.

Adapted from National Science Foundation studies done in the engineering ethics field

## **POSITION ONE: IMPROVE THE SOFTWARE**

### **Has Derek acted ethically?**

Yes. Derek went to work for a company that doesn't compete with his previous employer.

It is not likely that their adaptation of the software will be used anywhere else.

They are not planning to make money by selling the idea to someone else.

Derek cannot be expected to partition his brain into segments based on the source of his knowledge.

He has to use the knowledge he has accumulated and should not be expected to keep it a secret forever.

The new company has the right to benefit from his skills, especially since the first company didn't patent the software.

## POSITION TWO: KEEP IT A SECRET

### Has Derek acted ethically?

No. He signed a secrecy agreement with his company that required that the information was to be kept in the company. This should also apply to using information from other companies.

Honesty requires that he should honor that agreement.

His previous company will probably lose the opportunity for income, because even if Derek's new company doesn't share the idea with anyone else, it's very likely that someone in the company will move to a new company and will use it there.

Derek has no control over where it goes.

# WORKSHOP LESSON PLAN

## PLANNING—SEQUENCE OF EVENTS

### Description

This session introduces high school students to planning skills they can use as group leaders and in their lives.

### Learning Objectives

After completing this session, the student should know:

- Basic planning principles
- The role of planning in leadership
- Various successful planning techniques

### Materials Required

- Overhead projector, screen, extension cord, and spare bulb
- Five overhead transparencies reproduced from Handouts/Overheads at the end of this lesson plan
- Copies of two handouts reproduced from Handouts/Overheads at the end of this lesson plan (one copy for each student)

### Session Time Required

Approximately 50 minutes

## Introduction

Tell students: Someone once said, “A goal is just a dream with a deadline.” That goal will remain a dream unless you create and execute a plan of action to accomplish it. Every goal that gets accomplished has a plan behind it.

Ask the students to define planning. Write their answers on a flip chart pad or chalkboard.

(After you have several different definitions on the board, display the “Purpose of Planning” overhead from Handouts/Overheads at the end of this lesson plan. Discuss the reason for using the planning process.)

Planning is the process by which you (1) decide whether you should attempt a project, (2) work out the best way to reach your goal, and (3) prepare to overcome unexpected difficulties. It is how you turn dreams into achievements.

**Avoid wasted effort.** Planning helps you avoid the trap of working extremely hard but achieving little. Time spent planning increases the likelihood of success and avoids wasted effort.

- Without adequate planning, it is easy to spend large amounts of time on activities that turn out to be unimportant.
- Lack of planning can cause you to miss deadlines because you have not correctly planned the order in which various parts of a job should be done.

**Prepare lists.** As part of the planning process, make lists of resources needed and deadlines for finishing various parts of the project.

- List the resources needed and then make certain they will be available. This ensures that the project will not fail or suffer from the lack of a critical resource.
- Plan the project in the most efficient way possible so people’s time is not wasted. This raises morale and shows you to be an effective leader.

**Benefits of planning.** At times, when you’re eager to get started on a project, planning may seem to take too much time. But remember that planning saves you time in the long run.

- Planning allows you to gain the maximum return for the time spent by you and your group members.

- Planning allows you to take into account the unexpected and to be more likely to deal successfully with change when it is necessary.

## Why Firms Avoid Planning

(Display the “Why Firms Avoid Planning” overhead from Handouts/Overheads at the end of this lesson plan and discuss the reasons with the students.)

## Why People Don’t Plan

(Display the “Why People Avoid Planning” overhead from Handouts/Overheads at the end of this lesson plan and discuss the reasons with the students.)

## The Planning Stages

(Display the “The Planning Cycle” overhead from Handouts/Overheads at the end of this lesson plan and distribute it as a handout.)

An effective plan is more than just writing down a few steps about what we want to do. It is a process with several stages that helps us make better decisions about where we are, what alternatives we have, what resources we need, and what we can realistically expect to accomplish.

It is also important to rid ourselves of the idea that once we write a plan, it cannot be changed. Sometimes we learn that our original plan is too costly or requires more time or people than we have available. In that case, we need to return to an earlier stage of planning, scale down our expectations, and modify our plan.

Planning is not a one-way street. Think of planning, instead, as more of a spiral: a process that moves forward, but allows us to return to earlier stages to modify our plans based on new information we may have received.

The planning process includes the following stages:

- **Analyze the problem.** Use individual and group brainstorming to discuss current problems or concerns and to gather as wide a range of proposed solutions as possible.
- **Identify the aim.** After hearing all ideas in the brainstorming session, express the purpose of your group’s plan in a single sentence. This helps you focus on what is important in plan-

ning, while avoiding wasting time on irrelevant issues.

- **Explore options.** Now, from all the options considered, select the one that best fits your group's stated aim and available resources (time, expertise, and money).
- **Make a detailed plan.** In this stage, you work out what is the most efficient way to accomplish your aim. Who will do what, when will they do it, and at what cost?
- **Evaluate the plan.** Pause a moment as a group and take a really hard look at your plan. Ask yourselves: "Will it really work? Is the expected outcome really worth the time, effort, and cost?" If not, return to earlier stages in the planning process to modify your plan or to select a different option.
- **Implement the plan.** Make assignments to people to begin carrying out your plan. Have a reporting procedure to make people accountable for completing their assignments and to allow for dealing with problems as they arise. Remember that as you carry out your plan, you may discover the need to change it.
- **Seek feedback.** Get feedback from people inside and outside your group. What went well? What didn't? Then take the time to consider what you could have done differently. This will help you and your organization learn from your successes and mistakes.

## Analyze the Problem

During brainstorming, people suggest ideas as quickly as possible without worrying about anybody making fun of them. No criticism of any ideas is allowed during brainstorming. Brainstorming can be done individually, in groups, or in some combination of the two. There are advantages to each method.

**Plan A.** One way is to give a short amount of time for people to jot their ideas down on paper. Then provide time for them to share their ideas. During the discussion, encourage participants to share any additional ideas that occur to them as a result of hearing other people's ideas.

**Plan B.** Another way to conduct brainstorming is to omit the writing stage and go straight to the discussion stage, throwing the discussion

open immediately for people to suggest solutions and react to one another's suggestions. Pick the method that works best for your group.

Remember to have someone make a record of all suggestions for later use.

(Display the "Role of a Leader in Brainstorming" overhead from Handouts/Overheads at the end of this lesson plan and distribute the "Brainstorming" handout.)

During brainstorming, the leader has several duties:

- **State the problem clearly.** Focus on one particular problem. Be specific.
- **Announce a fixed amount of time.** Tell people how much time they have for brainstorming.
- **Encourage creative thinking.** Remind them that the purpose is to have fun and to come up with new and creative solutions to problems. By sharing their ideas—no matter how wild—they may spark the group to discover the best ideas.
- **Keep the discussion on target.** Don't let the discussion stray too far from the assigned topic. The leader must gently guide the discussion, thanking participants for their ideas and then asking how a particular idea may suggest a solution to the stated problem.
- **Make a record of ideas.** A record should be kept of the session, either as notes or on a tape recording. It is also helpful to jot the ideas down on a chalkboard or flip chart for all to see.

## Identify the Aim

After hearing all ideas in the brainstorming session, express the purpose of your group's plan in a single sentence. This helps you focus on what is important in planning, while avoiding wasting time on irrelevant issues.

## Explore Options

Once you have explored the options available to you, it is time to decide which one to select.

If you have the time and resources available, you might decide to evaluate all options, carrying out detailed planning, costing, risk assessment, etc., for each.

## Make Detailed Plans

Now comes the fun part. This is where you write down lists of what needs to be done, who needs to do it, when it needs to be done, and at what cost. This kind of detailed planning takes time, but saves time in the long run.

First, list *all* the key steps that need to be accomplished. If some of these are large and complex, break them into smaller key actions. Decide which are important and which are not. Omit the unimportant steps.

Second, decide which order they need to be done in and who will do them. Estimate the time needed for each step. Allow extra time for those unexpected things that happen.

Third, list everything needed for each step. This checklist should include supplies, equipment, people, workspace, etc. Use this list to make certain everything needed is ready at each step of your plan.

## Evaluate the Plan

Now is the time to ask some hard questions: Will it really work? Is it worth the cost? Does it have unexpected effects—either good or bad? You may also find that the plan is just too expensive or that unforeseen circumstances have made the plan unworkable. This can be frustrating. But it is better to discover problems with your plans and change them than to continue on the road to failure.

In evaluating a plan, remember that a good plan will do the following:

- Give a brief analysis of the problem.
- State its aim clearly.
- List the needed resources and their source.
- Detail what needs to be done, by whom, in what order, and by when.
- Provide reporting procedures so someone has the job of making sure everything is done on time and correctly.
- Plan for the unexpected by building extra time and resources into the plan.

## Implement the Plan

Now you are ready to execute the project. If your plans are solid, things will go smoothly. If your

plans are faulty, then you have a very long and hard project ahead of you.

You will increase the likelihood of your plan's success by having involved people in the planning process. This means they now have a stake in seeing it succeed. They will be more motivated to do something they helped plan than something that was just assigned to them.

Check up on people. Make certain they understand their assignment and ask if they are encountering any problems. This does two things: (1) It lets them know they are accountable to someone for getting their assignment done, and (2) it allows you to learn of problems early so you can make needed changes in the plan.

When the project is completed, mark it formally with some sort of ceremony—whether a meal or an awards presentation. This helps people share in the feeling of success and makes it more likely they will want to participate in future projects.

## Seek Feedback

The final step is taking a moment to evaluate how the project went at each step. Ask participants to share with you things that went well and things that didn't. Consider holding a brainstorming session that allows people to suggest improvements or changes for the next time around. This is a way to let your group or organization benefit from your experience.

## Closing

Planning is important to your success as a leader of an organization. People and organizations have many excuses for avoiding planning, but the benefits of good planning make the time spent planning worthwhile.

Good leaders involve members of their organization in the various stages of planning. This gives them a feeling of involvement and a stake in the outcome of the planned project. Good plans include lists of resources and provide time lines for various parts of the project to be completed. Reporting procedures are also included so people know they are accountable for doing their assignments.

Good leaders also plan for the unexpected by building extra time and resources into the plans.



Additionally, they listen to what members of their group tell them during the project in case changes need to be made in the plans.

Afterward, they seek feedback from people involved with the project, asking what went well and what didn't so they can learn from their successes and failures.

## Planning Activity

The purpose of this (optional) activity is to take the students through some of the initial stages of the planning process. They will not have enough time to make detailed plans, but will at least get a feel for what each stage involves.

Pick a problem applicable to your group, for example, teens' need for summer jobs.

**Analyze the problem.** Use a brainstorming session to let the students discuss the job situation for teens in their community and to suggest possible solutions—things their group could do to help teens find employment. Remember to announce a set amount of time. You may use individual or group brainstorming techniques.

**Identify the aim.** After the brainstorming session, have each student write a single sentence that clearly defines the purpose of the group's plan with some degree of specificity. Ask several volunteers to read their statements. Discuss.

**Explore options.** The group should discuss the options and select the best plan from all the solutions offered that fit the resources of the group (time, expertise, and money).

**Make detailed plans.** You won't have time to make very detailed plans, but start the students thinking about some of the details. Make a list of the various steps of the project and the resources needed at each step. After the students have spent some time at this, remind them that if this were a real project, they would continue until all details were specified.

**Evaluate the plan.** Even though the plans won't be complete, you can still ask the students to make an evaluation of their plans so far. Do they appear realistic? Would they likely succeed? Why or why not? What modifications might need to be made?

**Close.** Remind them that the next two steps would be to implement the plan and provide reporting procedures that would allow the leader to be certain the project was being completed in a timely and efficient fashion. Remind them that the leader should always be prepared to implement changes in the plan as needed as the project is carried out. Finally, the last step would be to seek feedback from which they could learn what they did well and what improvements they might want to make in future projects.

## PURPOSE OF PLANNING

Planning is the process by which you (1) decide whether you should attempt a project, (2) work out the best way to reach your goal, and (3) prepare to overcome unexpected difficulties. It is how you turn dreams into achievements.

### **Avoid Wasted Effort**

Planning helps you avoid the trap of working extremely hard but achieving little. Time spent planning increases the likelihood of success and avoids wasted effort.

### **Prepare Lists**

As part of the planning process, make lists of resources needed and deadlines for finishing various parts of the project.

### **Benefits of Planning**

At times, when you're eager to get started on a project, planning may seem to take too much time. But remember that planning saves you time in the long run.

## WHY FIRMS AVOID PLANNING

- **Poor reward structures.** If an organization assumes success is the norm, it may fail to reward those who achieve success. In contrast, it may punish (by failure to promote or give a raise) those who risk something and fail. Under this system, it is often better for an individual to do nothing than to try to achieve something and fail.
- **Firefighting.** An organization can be so deeply embroiled in crisis management and firefighting that its members simply do not have the time to plan.
- **The “no time” routine.** Some organizations may oppose planning as a waste of time. This can happen when the organization is doing a very simple job or when managers are very experienced. However, this attitude denies new employees the benefits of planning and puts a greater load on experienced managers.
- **Too “costly.”** Some organizations don’t want to pay the wages or salaries for time employees spent in planning. They are culturally opposed to spending resources. Sometimes cost cutting is appropriate, but often this attitude applied toward planning is shortsighted. Those with this attitude fail to realize that resources spent on planning in reality are an investment.

## WHY PEOPLE AVOID PLANNING

- **Laziness.** People simply do not want to devote the time needed to think through a plan.
- **Resistance to change.** Some individuals may not see the benefits of the planning process, may be fearful of change, or may in fact be opposed to change because they benefit from the way things are now.
- **Fear of failure.** By not taking action, there is little risk of failure unless a problem is urgent and pressing. Whenever something worthwhile is attempted there is always some risk of failure.
- **Experience.** As individuals gain experience on a job, they may find that they rely less and less on planning. This may be appropriate. However, even an experienced worker can benefit from an occasional planning exercise that may point to better or more efficient ways of doing things.
- **“Not again” attitude.** People who have spent long hours in poorly organized planning meetings with little or no positive results may not want to try it again. Poorly done, planning can be time-consuming and wasteful. Done properly, it can be highly beneficial.

## THE PLANNING CYCLE

The planning process includes the following stages:

- **Analyze the problem.** Use individual and group brainstorming to discuss current problems or concerns and to gather as wide a range of proposed solutions as possible.
- **Identify the aim.** After hearing all ideas in the brainstorming session, express the purpose of your group's plan in a single sentence. This helps you focus on what is important in planning, while avoiding wasting time on irrelevant issues.
- **Explore options.** Now, from all the options considered, select the one that best fits your group's stated aim and available resources (time, expertise, and money).
- **Make a detailed plan.** In this stage, you work out what is the most efficient way to accomplish your aim. Who will do what, when will they do it, and at what cost?
- **Evaluate the plan.** Pause a moment as a group and take a really hard look at your plan. Ask yourselves: "Will it really work? Is the expected outcome really worth the time, effort, and cost?" If not, return to earlier stages in the planning process to modify your plan or to select a different option.
- **Implement the plan.** Make assignments to people to begin carrying out your plan. Have a reporting procedure to make people accountable for completing their assignments and to allow for dealing with problems as they arise. Remember that as you carry out your plan, you may discover the need to change it.
- **Seek feedback.** Get feedback from people inside and outside your group. What went well? What didn't? Then take the time to consider what you could have done differently. This will help you and your organization learn from your successes and mistakes.

## ROLE OF A LEADER IN BRAINSTORMING

During brainstorming, the leader has several duties:

- State the problem clearly.
- Announce a fixed amount of time.
- Encourage creative thinking.
- Keep the discussion on target.
- Make a record of ideas.

# BRAINSTORMING

During brainstorming, people suggest ideas as quickly as possible without worrying about anybody making fun of them. No criticism of any ideas is allowed during brainstorming. Brainstorming can be done individually, in groups, or in some combination of the two. There are advantages to each method.

**Plan A.** One way is to give a short amount of time for people to jot their ideas down on paper. Then provide time for them to share their ideas. During the discussion, encourage participants to share any additional ideas that occur to them as a result of hearing other people's ideas.

**Plan B.** Another way to conduct brainstorming is to omit the writing stage and go straight to the discussion stage, throwing the discussion open immediately for people to suggest solutions and react to one another's suggestions. Pick the method that works best for your group.

Remember to have someone make a record of all suggestions for later use.

During brainstorming, the leader has several duties:

- **State the problem clearly.** Focus on one particular problem. Be specific.
- **Announce a fixed amount of time.** Tell people how much time they have for brainstorming.
- **Encourage creative thinking.** Remind them that the purpose is to have fun and to come up with new and creative solutions to problems. By sharing their ideas—no matter how wild—they may spark the group to discover the best ideas.
- **Keep the discussion on target.** Don't let the discussion stray too far from the assigned topic. The leader must gently guide the discussion, thanking participants for their ideas and then asking how a particular idea may suggest a solution to the stated problem.
- **Make a record of ideas.** A record should be kept of the session, either as notes or on a tape recording. It is also helpful to jot the ideas down on a chalkboard or flip chart for all to see.





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