The Synergos Institute

BRIDGING LEADERSHIP INTRODUCTORY SEMINAR

Leadership for Social Change

–Facilitator Notes–

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Bridging Leadership Introductory Seminar Facilitators Notes

Overview:

The introductory training module is the first of a four module Bridging Leadership training curriculum. This first module is designed to develop understanding of key concepts and introduce ideas and analytical tools. More specifically, the introductory module is designed to meet the following three objectives:

- **To better understand our own leadership attributes and challenges**
- **To increase participants' understanding of the critical role of leadership in bridging societal divides**
- **To develop awareness of the capacities needed to build and sustain collaboration**

The following three modules move quickly from knowledge/awareness building to specific skill development. Each of the following three modules focus on the following specific themes:

- **Module 2 – Learning about ourselves, others and our environment**
- **Module 3 – Developing Common Ground through Dialogue**
- **Module 4 – Partnering for Sustainability**

This program contains the trainer's notes for the introductory training module. It is intended to be a "living" document with trainers continually adding and amending the notes to provide the most effective and innovative methodology for engaging a broad range of participants.

Each activity contains the following items:

- **Time required:** The amount of time recommended for the exercise (broken down to different components when appropriate)
- **Equipment Needed:** The equipment needed for the activity (includes both presentation equipment and items needed for experiential learning games)
- **Overheads:** The overheads that the trainers need to provide to the participants. These items are generally not included in participants binders – when they are they will be also listed in the category below.
- **Handouts:** The items that participants need to complete the exercises. These items are to be included in the binders and/or given out at the time of the exercise.
- **Activity:** A quick description of the type of activity - presentation, discussion, experiential exercise, etc.
- **Learning Objectives:** The main learning concepts to be accomplished in the exercise
- **Purpose/Major Learning Points:** The key ideas that the trainers should try to incorporate into the discussion and debriefs
- **Description:** A step by step guide to the activity. This is a detailed description of what happens and when it happens throughout each activity session

This document is intended to be a guide for facilitators to which they, in turn, will add her/his style and experience. In fact, the success of the training depends on modifying content and method to best fit each individual context.

The training exercises and methodologies have been developed by The Synergos Institute, Bridging Leadership Program Partners with support and materials from Mark Gerzon, Marty Linsky, The Rockwood Leadership Program, Robert Gass and others.

Please send your suggestions for further developing the training to the Bridging Leadership department at the following address:

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PARTICIPANT INTRODUCTIONS

Time Required: **40 minutes (depending on number of participants**
Equipment: **Talking Stick (optional or other tools)**
Overhead: **Introductory Questions**
Handouts: **None**

***Activity*:**
Consecutively, participants introduce themselves and respond to introductory questions from facilitator.

***Learning Objectives*:**
To introduce the participants to each other, to begin to see the variety of personalities, experiences and styles present, and to engage participants in the seminar.

***Purpose/Major Learning Points*:**

1. **Introduce participants to each other**
2. **Establish that this training will involve personal and new sharing by the participants**
3. **Facilitator can gauge how willing participants are to share openly and to understand the goals and challenges of the group.**

***Description*:**

1. **Room should be set up with ample space to allow participants to sit in circular formation which allows for eye contact for all.**
2. **Facilitator introduces the activity with its following instructions:**
   - **There will be X number of rounds of questions (1-3)**
   - **We will proceed in a circle moving counter clockwise**
   - **If you choose to, you may pass. We will come back to those who have passed for a second opportunity at the end.**
   - **Introduce the first question**
3. **If there are two facilitators, have the second facilitator answer the question to role model response**
4. **Continue around the circle**
5. **Check-in with those that have passed**
6. **Proceed to the second question**
7. **Sample introductory questions:**

   a. **Please tell us something about yourself which tells us what kind of person you really are.**
   b. **What keeps you awake at night?**
   c. **What is the road not taken for you? If you were not doing your current work, what would you be doing?**

d. What person is a model for how you would like to practice leadership? For what reasons?
e. What are your expectations for this program?
f. Name?
Briefly state what you do.
Greatest strength working in groups?
Greatest weakness working in groups?
g. Please introduce yourself and where you live.
h. Please introduce your parents and where they are from.

Facilitators Introductions

Time Required: **20 Minutes**
Equipment: **Overhead**
Overhead: **Training Objectives, Agenda, Working Groups, How to Maximize Training, Suggested Agreements, Training Challenges**
Handouts: **Agenda**

***Activity*:**
Presentation by Facilitators

***Learning Objectives*:**
To set goals, and establish expectations for the seminar and gain principles to maximize the learning experience

Envision what is possible if the next few days are successful

***Purpose/Major Learning Points*:**
1. **Set expectations for training**
2. **Identify that the seminar is a mix of personal development/reflection and general knowledge building on Bridging Leadership**
3. **Have participants think proactively on how they want to participate, what they want to contribute and what it means to be open to change**
4. **Stress that they are responsible for their learning and participation**
5. **Get agreement on confidentiality**

***Description*:**
1. **Facilitators walk through a series of overhead and flip chart materials**
2. **First review Seminar Objectives**
3. **Pause - Ask participants to think about why they are at the training? How they will contribute?**
4. **Have each one of them write down one or two personal objectives for the three days**
5. **Review the Agenda (participants have copy in their book). Go over quickly touching on major themes and not getting into particular activities.**
6. **Identify that the schedule moves back and forth between personal and general knowledge throughout each day.**
7. **Describe the three different types of Working Groups – Full facilitated groups, Small discussion groups, Three person consulting teams.**
8. **Review How to Maximize Seminar – pausing on each point and giving examples.**
9. **Review Suggested Agreements.**
10. **Have participants raise hands and agree.**
11. **Review the Training Challenges facing the group – these will change for every group and setting**

PERCEPTION OF LEADERSHIP

***Time Required*: 30 minutes**
***Equipment*: Flip Chart/Overhead**
***Overhead:* Leadership Distinctions**
***Handouts*: none**

***Activity*:**
Group Discussion

***Learning Objectives*:**
Illustrate the wide range of activities identified as leadership in the world today

To introduce some key distinctions in leadership activities

***Purpose/Major Learning Points*:**

1. **Each of us has our own previous idea and definition of leadership**
2. **There is a wide spectrum of leadership activities – Leadership acts are all around us**
3. **There are some key distinctions in looking at the spectrum of leadership activities**
4. **Introduce distinctions – Technical vs. Adaptive, Authority vs. Leadership, Individual vs. Collaborative**

***Description*:**
1. **Ask each person to write down their definition of leadership and the name of the first person or image that comes to mind when thinking of that definition**
2. **Go around the circle with each person reporting out their name**
3. **Draw out commonalities (answers tend to be all white "great men" and mostly Americans)**
4. **Introduce each of the distinctions, one at a time, reflecting on which cases exhibit which distinction**
5. **It is important to note that there is not a value judgment placed on the distinctions**
6. **This is also a time to potentially introduce the distinction between leader and leadership**

Bridging Leadership Introduction

***Time Required*: 30 minutes**
***Equipment*: Flip Chart**
***Overhead:* Leadership Distinctions, Bridging Leadership Definition; Bridging Leadership "Cone"**
***Handouts*: None**

***Activity*:**
Group Discussion

***Learning Objectives*:**
Introduce the definition and concept of Bridging Leadership

Discuss how Bridging Leadership works as a tool to address social divides

***Purpose/Major Learning Points*:**
1. **Get comfortable with the working definition of Bridging Leadership, Divide, Bridging Process, Bridging and collaboration**
2. **Introduce, from previous discussion, that Bridging Leadership is focused on adaptive, collaborative uses of leadership.**
3. **Bridging Leadership can happen at many levels – across sectors, within organizations, internationally and even within families**

***Description*:**
1. **Review the Leadership Distinctions and the areas which concern Bridging Leadership**
2. **Introduce the definition of Bridging Leadership**
3. **Talk about the examples of Bridging Leadership that exist both in the leadership snapshots and in the participants lives**
4. **Share Bridging Leadership cone diagram**

Note: This session may be used at any of a number of points throughout the first day, depending on context and circumstances.

SMALL GROUP CASE DISCUSSION

***Time Required*:** **45 minutes small group**
***Equipment*:** **none**
Overhead: **none**
***Handouts*:** **Bridging Leadership Case Study and HDI**

Please Note: It is useful to include the HDI Index of the country in which the training is occurring.

***Activity*:**
Small group discussion, followed by a large group facilitated discussion (see next session)

***Learning Objectives*:**
Analyze the societal divides and the factors that contribute to them in regards to a specific case

***Purpose/Major Learning Points*:**

1. **Bring the previous activity focused on understanding societal divides to a specific case**
2. **There are numerous divides that affect us both, horizontally and vertically**
3. **Clarity on the divides to be faced and their characteristics will make strategic actions and partnerships more effective**

***Description*:**

1. **Ask the groups to identify ALL the divides being faced in the case**
2. **Ask the groups to identify the primary divide(s) being faced**
3. **Break into the same discussion groups previously used**
4. **Ask for a different presenter from the previous session**
5. **Give each groups 45 minutes with a five minute warning**
6. **In a large group, have each group present key findings and conclusions known**
7. **Discuss findings and then relationship to HDI (it is always good to have this case be from the same region as the HDI report)**

IDENTIFYING & UNDERSTANDING DIVIDES

Time Required:	**45-75 minutes large group**
Equipment:	**Flip Chart/Overhead**
Overhead:	**Small Group Instructions, Large Group Instructions**
Handouts:	**HDI report for particular country/region**

***Activity*:**
Small group discussion, followed by a large group facilitated discussion

***Learning Objectives*:**
Analyze the societal divides and the factors that contribute to them

***Purpose/Major Learning Points*:**

1. **Understand the importance of analysis in Bridging Leadership**
2. **Understand how data/information reflect a social divide and understanding of it.**
3. **Understand what are the limits of data/information and what is needed to gain deeper appreciation for local reality**

***Description*:**

1. **Introduce the activity of HDI analysis**
2. **Use Flip Chart/Overhead to give question assignment to small groups**
3. **The questions are generally versions of :**
    a. **What would you consider the most serious social problems in the country/region?**
    b. **What region has the most prospects for development? Why?**
4. **Create small groups of minimum of 5 people each.**
5. **Ask each group to pick one member to present the findings to the larger group**
6. **Give each group 45 minutes**
7. **Give each group a 5 minute warning**
8. **When groups come back together, explain that there is no right answer**
9. **Have each group present its findings (in only 45 minutes, most groups will not be able to answer both questions or even one with deep analysis)**
10. **Spend ten minutes to go over the actual findings of each group**
11. **Spend the remainder of the time going over the questions on the Large Group Instructions that focus on the impact and importance of data and analysis in development work**

PURPOSE PRESENTATIONS

***Time Required*:** **45-60 minutes**
***Equipment*:** **Flip Chart/Overhead**
Overhead: **Purpose definition, Purpose Activity Instructions, Giving Feedback, Receiving Feedback**
***Handouts*:** **Feedback sheets**

***Activity*:**
Self reflection on personal purpose, presentations and feedback circles

***Learning Objectives*:**
To develop clear strategic purpose; presentation of the purpose

To continue to work on listening skills

To enhance the ability to give feedback

***Purpose/Major Learning Points*:**

1. **To gain personal clarity on personal mission**
2. **To think about what it means to live through that purpose**
3. **To practice presenting the purpose in an inspiring and convincing manner**
4. **To practice giving and receiving constructive feedback**

***Description*:**

1. **Present the Purpose Definition**
2. **Ask people to think about the idea of purpose and spend ten minutes writing down their personal purpose. Ask them to think about and refine the idea to one sentence or short phrase. The purpose should be thought of at any scope that is appropriate to the participants (from changing the world to being a great friend, etc)**
3. **Present the following ideas**
    a. **We are at our best when living through our individual purpose.**
    b. **Everyone has their individual purpose**
    c. **Nothing is done alone in development work**
    d. **Part of the art of Bridging Leadership is aligning multiple purposes**
    e. **We are going to practice inspiring people and bringing them closer to our personal vision**
4. **Go over the purpose activity**
    a. **There will be ten minutes to prepare the presentation**
    b. **Each presentation will last two minutes (the facilitator will give a sign when there is 15 seconds left and will say when time is up)**
    c. **There will be two minutes to give feedback on the sheets**
    d. **Go over the feedback sheets and categories**
    e. **Answer questions**

5. Set up the room to have two "on deck" chairs for the next presenters and clear place for presentations to occur
6. Give people ten minutes to prepare
7. Run exercise
   a. Presentation: 2 minutes (with 15 seconds left sign)
   b. 1 minute of filling out the feedback form
8. After each person has presented - review the Giving Feedback and Receiving Feedback Guides
9. Break the groups up into small groups of 5 -7 people each
10. Explain that in each group, each person will have six minutes to receive feedback. During this time the following should occur :
   a. Each person has to ask for feedback from the group.
   b. The person receiving feedback may ask another member of the group to take notes, so they can practice active listening
   c. Instruct the person not to speak during the feedback sessions and that there will be a break afterwards to get clarification.
   d. Stress the importance of saying "thank you" after receiving feedback.
11. Set up groups in separate rooms if possible
12. Run feedback sessions
13. Generally, it is a good idea for the facilitators to take part in these feedback groups to model giving constructive feedback
14. Take a 20 minute break after concluding this activity

360˚ DEGREE FEEDBACK

***Time Required*:**	**30 minutes set up**
	30 minutes personal analysis
	30 minutes real time consulting
***Equipment*:**	**Flip Chart/Overhead**
Overhead:	**Intention vs. Impact, 360˚ Evaluation Guide**
***Handouts*:**	**Survey Analysis Reports, Evaluation Guide Packet**

***Activity*:**
360ºdegree feedback and one-on-one processing

***Learning Objectives*:**
Build awareness of current strengths and weaknesses in working collaboratively

Identify internal boundaries to bridging

***Purpose/Major Learning Points*:**
1. **Begin to understand the complexities of perception**
2. **Learn that our image of ourselves may be different from how others perceive us**
3. **Discuss the value of feedback and general lack of it**

***Description*:**
1. **Introduce the chart of Intention vs. Impact**
2. **Present the idea that how even with our greatest efforts we often do not reach the full impact we desire**
3. **That in work with others, we need to know how we "show up" in groups and our strengths and opportunities for growth**
4. **Talk about the purpose of 360º degree evaluation**
5. **Review the survey itself describing the Analysis Report each person will receive. Give the following instructions**
    a. **The numerical questions will show tally marks that each answer received**
    b. **The answers you gave yourself are not included in the tally but are listed below**
    c. **Not ever respondent answered every question, so some may have more answers than others**
    d. **The text responses list your answers first and then the others.**
    e. **The average responses tend to be higher in the non-profit sector than the business sector**
6. **Explain that after reports are handed out they will have 20 minutes to review the data.**
7. **Use the 360º Degree Feedback Guide to explain how to mark up the report**
8. **After the twenty minutes ask them to match up with someone they feel comfortable with to review the questions in the 360º guide packet**

“REAL TIME” CONSULTING

***Time Required*:**	**45 minutes**
***Equipment*:**	**Flip Chart/Overhead**
Overhead:	**Small Working Group Instructions**
***Handouts*:**	**none**

***Activity*:**
Real Time Consulting on Individual Leadership Challenges

***Learning Objectives*:**
Reflect on individual leadership challenges in terms of key concepts and information presented throughout the training

***Purpose/Major Learning Points*:**
1. **To bring the ideas of Bridging Leadership and training to real world challenges**
2. **To ensure that training has practical applicability to each participant**

***Description*:**
1. **Introduce the small working groups activities**
2. **Ask people to get out their leadership challenges (this should have been given as a homework assignment prior to the training)**
3. **Go through the instructions, explaining that they will be meeting each day with the same three people**
4. **Introduce the major themes discussed and how to use them to look at each case**
5. **Explain that these sessions are designed to be for their benefit, there will be no reporting out to the larger group and the discussion will remain confidential**
6. **Ask the participants to self select the groups from people they don’t work with everyday**
7. **Give them 45 minutes and let them know when half the time has elapsed**

LISTENING SKILLS

***Time Required*:** **1 hour**
***Equipment*:** **Flip Chart/Overhead**
Overhead: **Active Listening Skills, Listening Activity Guide**
***Handouts*:** **none**

***Activity*:**
Introduction and one-on-one practice sessions

***Learning Objectives*:**
To deeply enhance the current skill level; to suspend judgment

***Purpose/Major Learning Points*:**
1. **To understand active listening**
2. **To learn key practices of active listening**
3. **To practice this skill**

***Description*:**
1. **Introduce the concept of active listening**
2. **Using Active Listening Skills chart, describe each of the techniques**
3. **Using the Listening Activity Guide, describe the activity.**
4. **Ask for a participant/volunteer to talk about a dilemma that he/she is facing**
5. **Move two chairs to the center of the room and showcase the activity. Have the participant speak and at natural pauses use the active listening techniques**
6. **After checking that the participants understand the exercise, have each practice for eight minutes each – one speaking then the other practicing active listening**
7. **Debrief for five minutes in the larger group**

SYSTEMS THINKING

***Time Required*:**	**2 hours 30 min** **Large Group Introduction- 30 min** **Small Groups Exercise- 60 min** **Large Group Presentation and Discussion- 60 min**
***Equipment*:**	**Flip Charts/ Photos**
Overhead:	**Definition of Systems**
***Handouts*:**	**none**

***Activity*:**
Facilitator Presentation, Group Discussion

***Learning Objectives*:**
1. Introduce Systems Thinking
2. Gain understanding of the working environment and critical interrelationships

***Purpose/Major Learning Points*:**

1. **Every event is connected to patterns embedded in structures**
2. **Patterns have meaning and are related and interdependent**
3. **Bridging Leaders must think systemically**

***Description*:**

1. **Introduce the concept of systems thinking**
2. **Show working definition**
3. **Show examples of mapping exercise on flipchart**
4. **Introduce Systems Thinking Exercise**

a. **Provide Photos**
b. **Ask "what about this should change"**
c. **Explain that in order to map, central point must be identified with all relevant issues following from there**
d. **Divide into small discussion groups and begin to brainstorm and map related system (s)**
e. **Each group will then present in the large group session**

5. **Tie discussion to Bridging Leadership**

STAKEHOLDER ANALYSIS

***Time Required*:**	**1 hour 15 min**
***Equipment*:**	**Flip Chart/Overhead**
Overhead:	**Stakeholder Analysis Definition, Stakeholder Analysis Matrix**
***Handouts*:**	**Case Study**

Please Note: Feel free to use this case or any other case study that illustrates divides between sectors.

***Activity*:**
Presentation, small group discussion, large groups discussion

***Learning Objectives*:**
Introduce stakeholder analysis framework

Identify different stakeholders and actors and define their interests

***Purpose/Major Learning Points*:**
1. **Understand stakeholder analysis**
2. **Learn the importance of stakeholder analysis to Bridging Leadership**
3. **Understand basic stakeholder matrix and decision box**

***Description*:**
1. **Introduce the concept of Stakeholder Analysis**
2. **Show the working definition**
3. **Using the stakeholder matrix, run through different categories with a real life example to illustrate the concepts (you can use from a case, such as Tessie Fernandez)**
4. **Have the discussion groups break and apply the stakeholder matrix to a case study**
5. **It is a good idea with limited time, to suggest that the groups work to get as complete a list of stakeholders as possible first, before going into some detail in each one**
6. **Have groups meet for 45 minutes with a five minute warning**
7. **In the large group discussion, have each group report out and talk about the process and skills necessary to build effective stakeholder analysis**

SMALL GROUP DISCUSSION: THE TESSIE FERNANDEZ CASE

Time Required**:** **1 hr**
Equipment**:** **Flip Chart/Overhead**
Overhead: **Stakeholder Analysis Definition, Stakeholder Analysis Matrix**
Handouts**:** **Case Study**

Activity**:**
Small group discussion

Learning Objectives**:**
Identify key bridging strategies and attributes from the case
Introduce stakeholder analysis and practical applications
Identify different stakeholders and actors and define their interests

Purpose/Major Learning Points**:**

1. **Bridging requires the ability to see holistically and think systemically**
2. **Bridging leaders can identify key actors and their interests**
3. **Bridging leaders can find common ground among key stakeholders**
4. **Bridging Leadership involves creating chains of trust among unlikely partners**

Description**:**

1. **Provide participants with guiding questions prior to moving into small discussion groups:**
   - **How would you describe Tessie's leadership?**
   - **What obstacles did she encounter?**
   - **What strategies did she employ?**
   - **Who were the key stakeholders?**

LARGE GROUP DISCUSSION: IDENTIFYING STAKEHOLDERS

***Time Required*:**	**1 hour**
***Equipment*:**	**Color paper**
Overhead:	**none**
***Handouts*:**	**none**

***Activity*:**
Role playing activity

***Learning Objectives*:**
Practice strategies for finding common areas of work and interests

***Purpose/Major Learning Points*:**

1. **Experience the process of bridging**
2. **Realize there are multiple phases and methods for bridging**

***Description*:**

1. **Prepare (before the session) pieces of colored paper with the names of each of the stakeholder from the case examined previously**
2. **Lay these papers in a circle on the floor**
3. **Ask the participants what knowledge, skills and attitudes it would take them to be effective and comfortable to operate in the center of the circle**
4. **Assign, or ask each participant, to take/hold one of the name cards**
5. **If there are more participants than name cards, ask them to be observers in the session**
6. **Go back to the stakeholder matrix and ask each person to fill out the categories for their role**
7. **The person who is the focus of the case should stand up at the front, with the others (with name cards) sitting in the circle, holding their placards in front of them.**
8. **Run the role-play for 30-60 min depending on the case**
9. **Debrief the "role" with roles and strategies that were used.**
10. **Draw on the observers to give observations and suggest alternative strategies**

USING STAKEHOLDER ANALYSIS

***Time Required*:**	**45 minutes**
***Equipment*:**	**Flip Chart/Overhead**
Overhead:	**Stakeholder Analysis Definition, Stakeholder Analysis Matrix, Stakeholder Interest Power grid**
***Handouts*:**	**Participant book materials**

***Activity*:**
Presentation and large group discussion

***Learning Objectives*:**
Introduce stakeholder analysis framework
Identify different stakeholders and actors and define their interests

***Purpose/Major Learning Points*:**
1. **Stakeholder analysis can be done systematically with a variety of tools**
2. **Exposure to tools**

***Description*:**
1. **Describe 2 – 3 analytic tools**
2. **Refer back to Tessie Fernandez case to illustrate practice**

COLLABORATION EXERCISE 1 – BOX

***Time Required*: 1 hour**
***Equipment*: Rope = 2 yards per person (continuous)**
***Overhead:* none**
***Handouts*: none**

***Activity*:**
Group Activity

***Learning Objectives*:**
Engage in experiential learning activity

***Purpose/Major Learning Points*:**

1. **Begin to address the complication of working in groups**
2. **Introduce communication challenges and group dynamics/leadership roles**

***Description*:**

1. **Have participants stand outdoors or against the wall in a large open room**
2. **Ask for volunteers to engage in the activity (minimum of 7 and max 17 it must be an odd number of participants) the rest is obvious**
3. **Ask participants to close their eyes**
4. **Place the rope (that is tied in loop) in the center of room, laid on the floor, without any twists in it**
5. **The rope should be long enough that the participants can stand at least arm length apart while holding on the rope and not touching each other**
6. **Explain that they have 7 minutes to make a "PERFECT SQUARE". The only other instructions are that both hands can never leave the rope and they must never open their eyes**
7. **Ask the observers to help act as "spotters" to make sure activity participants do not bump into the wall and observe leadership roles**
8. **Run the activity with a two minute time check before conclusion**
9. **Debrief the activity with emphasis on roles, strategies, participation and judging success/completion**

COLLABORATION EXERCISE 2 – BALLS

Time Required:	**20 min (15 min group exercise, 5 min sharing results of all groups)**
Equipment:	**4 juggling or tennis balls**
Overhead:	**none**
Handouts:	**none**

***Activity*:**
Group Activity

***Learning Objectives*:**
Engage in experiential learning activity

***Purpose/Major Learning Points*:**
1. Begin to address the complications of working in groups
2. Understand various methods of organizing
3. Understanding systems thinking
3. Understand various leadership roles
4. Introduce communication challenges and group dynamics

***Description*:**
1. Each group of 8-10 people will be given a set of 4 balls
2. Designate the first person to hold all the balls
3. Designate the last person to receive all the balls
4. Establish an order/sequence in which all four balls will be passed among the members in the group
5. Maintain the same order each attempt
6. Every member of the group must touch all 4 balls before the last person receives all 4 balls
7. Designate an outside observer as a timer
8. Begin to pass the balls
9. Target timing as a goal

PERSONAL ECOLOGY

***Time Required*:** **30 minutes**
***Equipment*:** **Flip Chart/Overhead**
Overhead: **Personal Ecology definition, Force Field Analysis, Time Management Matrix**
***Handouts*:** **Force Field Analysis, Time Management Matrix, Self Care Assessment, Urgency Index**

***Activity*:**
Individual exercises

***Learning Objectives*:**
Understand the range of issues that affect individual effectiveness and endurance in their work

***Purpose/Major Learning Points*:**
1. **To understand the concept of ecology and personal sustainability**
2. **To work with tools and concepts to deepen understanding and strategy**
3. **To illustrate that some obstacles are internal and other external**

***Description*:**
1. **Share definition of Personal Ecology**
2. **Discuss the goal and concept of maintaining work stamina over a lifetime**
3. **Introduce the tool of force field analysis as a tool for personal, team or organizational use**
4. **Walk through the instructions**
5. **Have each person write their purpose on the top of their diagram and spend 5-10 minutes completing the diagram**
6. **Discuss the concept that most of us feel that "to accomplish our goals we often have to work harder", but what may be necessary is not working harder but removing some of the obstacles**
7. **Discuss that some of the items are beyond our control, but that being aware of them allows us to be more strategic in our activities**
8. **Introduce Covey's Time Management Matrix**
9. **Ask for examples if participants have used it before**
10. **Review the quadrants and different activities in each**
11. **Have participants spend 5 minutes filling out the sample form**
12. **Discuss results for five minutes (many participants will blame their organizations for putting certain items in certain categories**
13. **Introduce the urgency index as a tool to assess the stresses we put on ourselves.**
14. **Have participants spend five minutes filling out the survey**
15. **After that, ask how many people scored**
    a. **Below ten**

b. **Between 11 – 20**
c. **Between 21 – 30**
d. **Between 31- 40**
e. **Between 41- 50 (usually most responses)**
f. **Between 51- 60 (usually most responses)**
g. **Between 61- 70**
h. **Above 70**

16. **Discuss for five minutes**
17. **Lastly, have them fill out their self care assessments before taking a break**

GROUP ECOLOGY

Time Required: **30 minutes**
Equipment: **Flip Chart/Overhead**
Overhead: **Group Ecology Definition**
Handouts: **Readings on partnership, Team Performance Inventory, Team assessment Worksheet**

***Activity*:**
Presentation, Large Group Discussion

***Learning Objectives*:**
1. Identify ways to manage and maintain collaboration in line with Bridging social divides
2. Analyze effective ways of managing resources to ensure sustainability of the bridging leadership interventions

***Purpose/Major Learning Points*:**

1. **Develop Awareness of strategies to maintain impact of collaboration**
2. **Draw on prior sessions, (especially the session on listening and communication), arriving at common starting point is critical**

***Description*:**

1. **Introduce concept and definition of group ecology**
2. **Discuss concept gaining insights from participants' examples**
3. **Discuss other successful strategies and techniques that support sustainable impact over time**
4. **Discuss pertinent leadership roles for maintaining group ecology**

SMALL GROUP AND LARGE GROUP CASE DISCUSSIONS: FECHAC AND KZN 2 (OR ANY APPROPRIATE CASE)

***Time Required*:** **45 minutes Small Groups**
1 hour Large Group
***Equipment*:** **Flip Chart/Overhead**
Overhead:
***Handouts*:** **Case Studies**

***Activity*:**
Small Group Case Discussion
Large Group Case Discussion

***Learning Objectives*:**
Identify types of partnerships and how partnerships were established and maintained

***Purpose/Major Learning Points*:**
1. **Partnerships come in all shapes and sizes**
2. **Sustainable partnerships require some institutionalization and may change institutional culture**
3. **Bridging leaders must be willing to let go**

***Description*:**
1. **Provide small groups with key guiding questions:**
   - **How would you characterize the leadership qualities of Samuel Kalisch and Inkosi Zibuse?**
   - **What partnerships did they seek to build?**
   - **How did they go about building partnerships?**
   - **What challenges did they face?**
   - **How were they able to overcome these challenges?**

2. **Have small groups prepare presentations for a large group discussion**

Collaboration Typology

***Time Required*: 1 hour**
***Equipment*: Flip Chart/Overhead**
***Overhead:* Collaboration Typology, Shared information to shared identity chart**
***Handouts*: Collaboration Typology**

***Activity*:**
Presentation, Discussion

***Learning Objectives*:**
Understand the range of potential possible collaborative relationships

***Purpose/Major Learning Points*:**
1. **To develop understanding that different collaborative relationships exist for different goals and needs**
2. **To become familiar with general categories of collaborative relationships**

***Description*:**
1. **Introduce idea of collaboration typology**
2. **Show and discuss shared knowledge for shared identity chart**
3. **Discuss the relationship between growing collaborations and the typology – (some will evolve to a new type of relationship and some will not)**
4. **Ask participants to give examples of collaborative relationships and their respective categories**

LEADERSHIP ROLES AND QUALITIES FOR SUSTAINING PARTNERSHIPS

***Time Required*:** **45 minutes**
***Equipment*:** **Flip Chart/Overhead**
Overhead: **Power point**
***Handouts*:**

***Activity*: Large group discussion**

***Learning Objectives*: Clear understanding of roles and qualities needed to build partnerships**

***Purpose/Major Learning Points*:**

1. **Partnerships require many leadership roles**
2. **Trust is key ingredient**

***Description*:**

1. **Present PowerPoint presentation**
2. **Invite participants to think of a partnership in which they have worked or are currently working**
3. **Have them apply the framework to that partnership**

DIALOGUE

Time Required:	**30 minute Introduction**
	1 hour Large Group Dialogue
Equipment:	**Flip Chart/Overhead**
Overhead:	**Dialogue Definition, Dialogue Graph, Saunders Stages**
Handouts:	**Saunders Stages**

***Activity*:**
Introduction presentation, Experiential Exercise, Debrief

***Learning Objectives*:**
Develop introductory understanding of Dialogue approach and components

***Purpose/Major Learning Points*:**
1. **Understand the concept of dialogue and how it differs from traditional discussion/debate**
2. **Realize there are multiple stages and styles of bridging**
3. **Analyze different roles and dynamics in bridging situations**

***Description*:**
1. **Introduce the concept of Dialogue**
2. **Show the Dialogue Chart**
3. **Hold for ten minutes of discussion on examples of dialogue (vs. debate)**
4. **Introduce the next activity as a "REAL" initial dialogue session**
5. **Show the Dialogue topic on the flip chart (this topic should be chosen earlier and be a topic that has personal and/or professional significance to the participants. The topic should allow for opposing viewpoints and beliefs to be drawn out.**
6. **Run the dialogue for 45-60 min**
7. **During this time, it is crucial for the trainers' to take notes regarding the participation and roles of each participant (did everyone speak, who was aggressive, who followed process, etc)**
8. **Start the debrief by asking participants to explain their roles in the dialogue**
9. **Bring into the discussions the trainers observations and notes**
10. **Ask the group how this quick exercise did and did not reflect real world dialogue situations**