

LEADERSHIP PRIMER

Effective tools for being a leader, including tools for leading meetings, creating agendas, managing group dynamics, and negotiating...

As learned in the UCSF-CORO collaborative

*CCFL Faculty Development Day
September 11, 2012*

Agenda (5 mins)

- Welcome and Brief Introduction
- Purpose of Session
- Demonstration of tools – thank you to CORO Center for Civic Leadership
- Questions and answers
- Wrap-up
 - Other situations where tools useful
 - Other CORO tools
 - Upcoming CORO sessions

W of A

Wedge of Awareness



an unaccustomed change in routine to heighten attention

- **W**edge of **A**wareness



Now we'll take you to academic real-time →

“The meeting.....”

- *Setting:* A faculty search committee meeting
- *Dramatis personae: (in order of appearance)*
 - Professor **Take Charge**
 - Professor **Good Vibes**
 - Professor **Logical Analysis**
 - Professor **Big Picture**
- Professor **CORO leader**

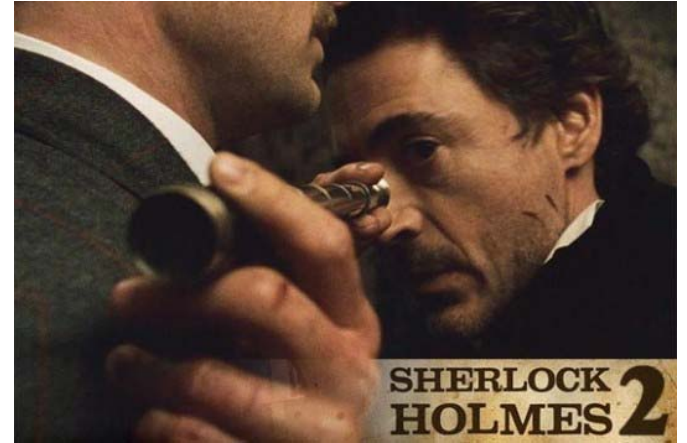
Scene 1

WIGO

- What Is Going On?

WIGO

- What Is Going On?



- A step back to “read between the lines” in an ongoing interaction, assessing underlying texts and issues

Scene 2

OARRS

- Outcomes
- Activities
- Roles
- Responsibilities



OARRS

- Outcomes
- Activities
- Roles
- Responsibilities



➤ used in setting agenda for meetings, discussions, etc.



Scene 3

4 WH

- Who?
- What?
- When?
- Where?
- How?

- *Not “WHY?”*

➤ Uses:

- to gather data to add depth to understanding the agenda items and process
- to minimize judgmental inquiry



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Examples of 4WH Questions

WHAT **What** leads you to conclude that?

WHO **Who** have you spoken with about your concerns?

WHERE **Where** do your assumptions come from?

WHEN **When** were you given this information?

HOW **How** does this relate to your other proposals?

Scene 4

Balancing Advocacy and Inquiry

- Interrogation and advocacy in an interactive process



- Uses:

- to facilitate and expand exchange of information to create more depth in agenda items and process
- to maximize interactive progress in meeting
- to ensure that multiple perspectives are taken into account
- to empower others in the process

FIAO

- **F**acts
- **I**nferences
- **A**ssumptions
- **O**pinions



➤ Uses:

- to determine the source, validity, and strength of information available for decision making
- to encourage decision makers to judge whether additional factual information is needed

Scene 5

Other situations/meetings

- Grant proposals
- Lab meetings
- Departmental meetings
- Budget preparation
- Program planning
- School, campus, or professional society committees

Other CORO tools

- Leadership compass
- **LDWpF = *load, design, working parts, fuel***
- **Giving and receiving feedback**
- **Strategic messaging** /media training
- Negotiation
- Dot voting
- Backwards planning
- **Active listening**
- Interviewing
- Etc.

CORO Faculty Leadership Collaborative

- Established in 2005
 - Goal to support & advance faculty careers w/ training in leadership skills
- Methods: multi-session, small group, interactive meetings
- Graduates: 120 (all 4 UCSF schools, all disciplines & ranks)
- Courses to date:
 - Full 10-session **UCSF-CORO Faculty Leadership Collaborative** in 7th year. The Fall 2012 program starting August 16.
 - **CORO Tools Refresher** workshop for prior graduates held in 6/2011
 - 2 new introductory workshops for junior faculty (April & May 2012)
 - *Is leadership in your future?*
- Next scheduled sessions
 - 3-day program: **to be determined**
 - 10-session UCSF-CORO Faculty Leadership Collaborative: **Spring 2014**
- Program Coordinator: Irene Merry

CORO: “value added”

- Time investment, but it is also time ***protected***
- Personal
 - Leadership skills
 - Self-reflection
 - Self-awareness
 - Empowerment, and self-advocacy
- Opportunities to work on specific personal leadership problems or situations by peer consultation and group problem-solving
- Connections and networking
- Systems
 - Exposure to campus leaders, their experiences and their “pearls”
 - Improved understanding of UCSF and its working parts

Questions



Setting up the demonstration skit (1 min)

- Setting: departmental search committee
 - Personae: Committee chair plus 4-5 committee members of different styles on personality/leadership compass
 - Timeframe: 1 hr meeting (to take 40 min of session)
 - Goal: to rank 3 previously discussed qualified candidates for a faculty position
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- Start: *Chorus*: Introduces skit and →
 - TOOL 1: *WEDGE OF AWARENESS*

Session outline:

Tools modeled in skit, then summarized with slides (40 mins)

- 1 Disorganized search committee meeting underway....
“We’re not getting anywhere!”
 - TOOL 2: *WHAT IS GOING ON HERE (WIGO)*
 - ➡ *Audience participation to discuss errant process*
- 2 Chair or committee member re-directs...
“We have already discussed these three candidates.”
 - TOOL 3: *OUTCOMES, ACTIVITIES, ROLES, RESPONSIBILITIES (OARRS)*
 - a. Outcome: “to rank our final choice
 - b. Activities: “discuss for 2 minutes each candidate
 - c. Roles: “advocate presents; opponent rebuts
 - d. Rules: “all participate, no one dominates”
 - ➡ *Search committee discussion ensues*

Skit outline [continued]

3 Discussion of candidates ranked and unranked [sidebar]

➤ TOOL 4: *BALACING INQUIRY AND ADVOCACY*

Committee members advocate for unranked candidates, inquire about comparisons with ranked candidates

4 Return to discussion of candidates

➤ TOOL 5: *WHO, WHAT, WHERE, WHEN, HOW (4WH)* **NEEDS WORK!**

a. *Who: "Who gave you that information?"*

b. *What: "What does he/she bring that is missing in our department?"*

c. *Where: "Where would we find lab space?"*

d. *When: "When would he/she be able to relocate to UCSF?"*

e. *How: "How will he/she relate to house officers?"*

ending in: "He doesn't have all that we're looking for, but will be superb."

"What leads you to say that?"

5 Further discussion of candidates

➤ TOOL 6: *FACTS, INFERENCES, ASSUMPTIONS, OPINIONS (FIAO)*

➡ *Review committee members data on candidates* → *Takes too long!*

6 Chair reins in discussion

➤ TOOL 7: *STOP, START, CONTINUE*

"Hang on here. This is just Candidate# 1. We've got two more to discuss!"

a. *Stops the discussion on Candidate #1*

b. *Starts discussion on Candidate #2*

c. *Continues time keeping to discuss Candidate #3.*

Skit outline [continued]

7 Ranking of candidates

➤ TOOL 8: *LOAD, DESIGN, WORKING PARTS, and FUEL (LDWpF)*

a. *Load: “We want the best candidate for the job and one that you will be proud to work with.”*

b. *Design: “Taking the candidates’ CVs and our discussion here today into account, we will rank the candidates from 1 to 3 in order of descending preference. Please remember that these candidates have been previously reviewed, so a “Do Not Rank” vote will require further discussion on why that choice is being made.”*

c. *Working parts: “Each of you will vote for the candidate you rank highest. We may need a repeat vote if there is a tie.”*

d. *Fuel: “This is your chance to improve the stature of faculty in our department and hire a faculty member that will work effectively here.”*

8 Candidates ranked and committee meeting ends