

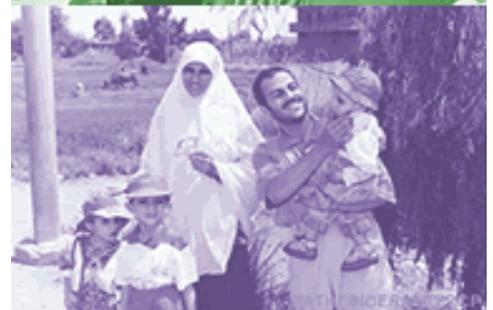
TAHSEEN Project/Catalyst Consortium

Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

December 2003
to March 2004



Project funded by United States Agency for International Development



CATALYST
consortium



The CATALYST Consortium is a global reproductive health activity initiated in September 2000 by the Office of Population and Reproductive Health, Bureau for Global Health, U.S. Agency for International Development (USAID). The Consortium is a partnership of five organizations: the Academy for Educational Development (AED), Centre for Development and Population Activities (CEDPA), Meridian Group International, Inc., Pathfinder International and PROFAMILIA/Colombia.



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Introduction and Overview of the Training Program

The TAHSEEN/Catalyst Consortium provides technical assistance to the Government of Egypt in the field of population and reproductive health. The aim of this training program was to provide technical assistance to the FP sector of the Ministry of Health and Population (MOHP) in order to enhance its capacity to supervise the governorate level staff.

BLI was contracted to develop and deliver a customized training program for supervision and leadership development in order to improve the combined capability of MOHP central office teams and the Governorate teams in “leading the quality improvement process”.

The training program was broadly divided into three workshops, which consecutively deal with the major elements of supervision. Each workshop was composed of two to three consecutive working days. The technical content of the workshops focused on the management and leadership tools that would allow the participants to handle future challenges. The first two workshops were followed by a practical component in which the supervisors from the CO and the staff from the Governorates implemented actual supervision together in the Governorates. The practical operations were based on the task list of the supervisors, which were agreed upon in TAHSEEN/MOHP workshops in July and August 2003.

Governorates Participating in the Program

The training program ran concurrently for two groups. Each group consists of five sub-groups for five different governorates. The sub-group of each governorate includes two supervisors from the Central Office staff and three management staff from the governorate, including a nurse supervisor.

The five governorates selected for Group One are:

1. Behira
2. Sohag
3. Gharbeya
4. Alexandria
5. Domiatt

The five governorates selected for Group Two are:

1. Fayoum
2. Menofia
3. Assiut
4. Sharkeya
5. Menia



Workshops

This report documents the series of three workshops conducted between December 2003 and March 2004. Each of the three workshops in the series was conducted twice – once for Group One and once for Group Two (i.e. six in total). The two workshops included the same technical material and covered the same topics.

First Workshop

The technical topics included:

- Leadership skills: personnel and technical
- Methodology
- Scanning: stakeholders – clients’ needs – organizational trends – strengths and weaknesses
- Focusing: critical challenges – planning a strategy – priorities.
- Management of relationships with others: types of people – delegating – managing meetings.

Group One: Tuesday 23 December, 2003 to Thursday 25 December, 2003, at the Hilton Hotel, 6th October City, Cairo.

The workshop was delivered by Dr. Samer Ezeldin. Dr. Ezeldin was assisted by three trainers, namely; Eng. Mohamed Barkouky, Eng. Hossam El Kashif, and Dr. Karim Salem.

Dr. Ezeldin used PowerPoint presentations to present the topics of the workshop (see Appendix 4). The trainers took advantage of this opportunity to interact with the sub-groups of the governorates they were to visit during the practical phase of the training program.

To ensure a better interaction between the participants and the instructor and between the attendees themselves, the following was implemented:

1. The sub-group of each governorate was asked to sit together around one table.
2. The instructor allowed questions and discussions throughout the workshop but kept the focus on the topics.
3. Group exercises were conducted on identifying stakeholders, clients’ needs, and critical challenges. During these exercises, the instructor and the trainers kept moving around the tables to stimulate the discussions, to clarify issues, and to answer questions.

Group Two: Wednesday 7 January, 2004 to Friday 9 January, 2004, at the Hilton Hotel, 6th October City, Cairo.

In order to better deliver the topics, the following variations from the first workshop were implemented:

1. The workshop started earlier on Wednesday evening (5 pm) to take advantage of the first evening in covering technical materials.
2. An Arabic version of the technical presentation was distributed to the participants with the English version. Throughout the workshop, two PowerPoint presentations were used on two different screens, one in Arabic and one in English.



Second Workshop

The technical topics included:

- Creativity: process and barriers
- Reporting of site visit #1 to governorates
- Group development
- Motivation
- Negotiation skills
- Resource allocation
- Data collection and indicators

Group One: Tuesday 20 January, 2004 to Thursday 22 January, 2004 at the Hilton Hotel in 6th October City, Cairo.

Group Two: Tuesday 10 February, 2004 to Thursday 12 February, 2004 at the Movenpick Hotel in 6th October City, Cairo.

The workshops were again delivered by Dr. Samer Ezeldin, Eng. Mohamed Barkouky, Eng. Hossam El Kashif, and Dr. Karim Salem. The PowerPoint presentations were in English and in Arabic simultaneously on two different screens to avoid any language problems. All discussions were in Arabic.

The second workshop was conducted in the same manner as the first with trainers interacting with the sub-groups of the governorates they were to visit during the remaining practical phase of the training program. Each sub-group of each governorate was asked to present a report about the outcomes of the first site visit to the rest of the groups.

Third Workshop

The technical topics included:

- Crisis management
- Project scheduling
- Resource management
- Project control and planning for sustainability
- Advocacy as a leadership skill

Group One: Tuesday 16 March, 2004 to Thursday 18 March, 2004 at the Movenpick Hotel in 6th October City, Cairo.

Group Two: Tuesday 23 March, 2004 to Thursday 25 March, 2004 at the Movenpick Hotel in 6th October City, Cairo.

The third workshop was delivered in the same manner and by the same team – with the addition of Eng. Yussry Mohamed – as the first two.



In the third workshop each sub-group of each governorate was asked to give a presentation about the action plan discussed during their second visit.

Group exercises were conducted on:

- Crisis management methodology,
- Motivation for action plan implementation,
- Scheduling of projects,
- Project control,
- Advocacy for a governorate related problem.



Appendix 1: Training Schedule

December 2003

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24 Theoretical W-1 Gr. 1	25 Theoretical W-1 Gr. 1	26	27 Bahira-B Sohag-K Gharbia-S
28 Bahira-B Sohag-K Gharbia-S	29 Bahira-B Sohag-K Gharbia-S	30	31			



January 2004

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3 Alexandria-S
4 Alexandria-S	5 Alexandria-S	6	7	8 Theoretical W-1 Gr.2	9 Theoretical W-1 Gr. 2	10
11	12 Fayoum-B Assiut-K Sharkia-S	13 Fayoum-B Assiut-K Sharkia-S	14 Fayoum-B Assiut-K Sharkia-S	15	16	17 Monofia-B Menia-K
18 Monofia-B Menia-K	19 Monofia-B Menia-K	20	21 Theoretical W-2 Gr. 1	22 Theoretical W-2 Gr. 1	23	24 Bahira-B Sohag-K Domiatt-S
25 Bahira-B Sohag-K Domiatt-S	26 Bahira-B Sohag-K Domiatt-S	27	28	29	30	31 Alexandria-s Gharbia-k



February 2004

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Alexandria-S Gharbia-K	2 Alexandria-S Gharbia-K	3	4	5	6	7
8	9	10	11 Theoretical W-2 Gr.2	12 Theoretical W-2 Gr. 2	13	14 Fayoum-B Assiut-K Sharkia-S
15 Fayoum-B Assiut-K Sharkia-S	16 Fayoum-B Assiut-K Sharkia-S	17	18	19	20	21 Monofia-B Menia-K
22 Monofia-B Menia-K	23 Monofia-B Menia-K	24	25	26	27	28
29						



March 2004

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17 Theoretical W-3 Gr.1	18 Theoretical W-3 Gr. 1	19	20
21	22	23	24 Theoretical W-3 Gr.2	25 Theoretical W-3 Gr. 2	26	27
28	29	30	31			



Appendix 2: List of Participants

Group One	Group Two
Dr. Hassan Ahmed Nabieh	Dr. Yehia Elhadidi
Dr. Essam Fasih	Dr. Mohamed Ibrahim
Dr. Ibrahim Gamal Eldin	Dr. Rawiah Shabaan
Dr. Ahmed Gasser	Dr. Halah Elaboudy
Dr. Amal Zaki	Dr. Moheh Mahmoud
Dr. Samyah Elshafaai	Dr. Afaf Abo Elelaa
Dr. Ahmed Lotfy	Dr. Ahmed Abo elfotouh
Dr. Hamdy Shahin	Dr. Mohsen Fathy
Dr. Elham Goubarah	Dr. Nefetha Aboeldahab
Dr. Abdel halim Ragab	Dr. Magdah Hussien
Dr. Maha Hemadh	Dr. Maha Hemidah
Dr. Salah Hassan	Dr. Azza Elhanafy
Sabel Loundy	Dr. Dr. Omaymah Zakarya
Safaa Khatab	Dr. Sherif Elsadek
Sherien Gamal	Maytha Tamam
Aziza Abdel Halim	Dr. Mona Aziz Kerolos
Dr. Nagwa Mahmoud Soultan	Dr. Ahmed Mostafa Almasry
Dr. Nabil Mohamed Daoud	Dr. Soad Abdelgeliel Abdelbaqy
Dr. Faten Mohamed Abdel Dayem	Dr. Afaf Mohamed Soliman
Dr. Abdel Basset Abdel hamid Saleh	Dr. Mohamed Ahmed Sharshar
Dr. Mona Hanna Mankarious	Dr. Hoda Gad Mansour
Dr. Bhiah Ali Mohamed	Dr. Ahmed Galal Mohamed
Dr. Alsayed Osama Elattar	Dr. Ahmed Mohamed Anwar
Dr. Amira Abdulla Elantraawy	Dr. Sameha Hassan Sayed
Dr. Nagwa Fahmy Elbadry	Dr. Abdel hamid Boraay
Dr. Amira Kamal Kassem	Dr. Hamidah Mohamed Elhoussany
Dr. Mamdouh Mohamed Amin	Dr. Mahassen Fouad Khtab
Dr. Sabiha Hamed Hussien	Dr. Atef Ezzat Gorgy
Dr. Mohamed Ryad Elhyfnawi	Dr. Mostafa Elshafed
Dr. Ahmed Abdelkader Elshoubary	Dr. Sahar Hasim Mohamed
Dr. Sawsan Abbas Elsayed	Dr. Gamal Eldien Elsayed Abo Elatta
	Dr. Samir Khalil Abo ismail
	Dr. Hanan Zakarya Elsayed



Appendix 3: Workshop Agenda

First Workshop

Day One

4:00 pm - 5:00 pm	Opening ceremony and overview of workshop
5:00 pm - 6:30 pm	Who is a good leader? Technical and personal skills
6:30 pm - 8:00 pm	Leadership methodology, integrated supervision and leadership
8:00 pm	Dinner

Day Two

9:00 am -10:00 am	The supervision process, preparation of task lists, roles and responsibilities of supervisory teams and clinical trainers.
10:00 am -12:00 pm	Leadership scanning: How to do it?
12:00 pm -12:30 pm	Coffee break
12:30 pm - 02.30pm	Leadership scanning: In house decision-making and collective thinking
2:30 pm - 6:00 pm	Lunch and break
6:00 pm - 8:00 pm	Work groups on scanning
8:00 pm	Dinner

Day Three

9:00 am -10:30 am	Leadership focusing: Identifying critical challenges, articulating purpose/mission and developing short term/long team goals.
10:30 am - 11:30 am	Leadership focusing: planning a strategy and setting priorities.
11:30 am - 01:30 pm	Break - Prayer
1:30 pm - 2.30 pm	Work group on leadership focusing
2:30 pm - 4:00 pm	Meeting management, types of people, delegating and managing meetings
4:00 pm	Closing ceremony – Lunch



Second Workshop

Day One

- 6:00 pm - 8:00 pm Creativity process, barriers to creativity, discussion questions on creativity, case study with questions
- 8:00 pm - 10:00 pm Presentation on a site visit to a governorate

Day Two

- 9:00 am - 11:00 pm Round table discussions on previous site visit and preparation of presentations
- 11:00 pm - 1:00 pm Group presentations and general discussions
- 1:00 pm - 3:00 pm Lunch and break
- 3:00 pm - 5:00 pm Group development: forming-storming-norming-performing
Dynamics in groups: roles - creative conflict - working groups vs. teams.
- 5:00 pm - 8:00 pm Motivation factors, motivation in a stable organization, discussion questions on motivation, case study with questions

Day Three

- 9:00 am - 11:00 pm Negotiations skills and strategies
- 11:00 pm - 2:00 pm Resource allocation - data collection - feedback



Third Workshop

Day One

- 6:00 pm - 9:00 pm Crisis management, types of crisis, integrated view of crisis management, organizing for crisis management, arranging the players
- 9:00 pm - 10:00 pm Supervision of governorate staff for sectors

Day Two

- 9:00 am - 1:00 pm Round table discussions on previous site visit and preparation of presentations, group presentations and general discussions on motivation and action plans
- 1:00 pm - 3:00 pm Lunch and break
- 3:00 pm - 8:00 pm Project scheduling and resource management, scheduling basics, time management, resource optimization.

Day Three

- 9:00 am - 11:00 pm Project control and planning for sustainability
- 11:00 pm - 2:00 pm Advocacy as a leadership skill



Appendix 5: Workshop Materials

First Workshop



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Leadership

Workshop 1

December 2003

Table Of Content- Leadership

- ✓ Introduction
- ✓ Skills
- ✓ Methodology
- ✓ Practicing Leadership
- ✓ Methodology: 1- Scanning
 - How to do it?
 - In House decision Making
 - Outcome

Leadership

- Introduction
- Why is management so difficult?
- Why Managers do what they do?
- Understanding basic leadership
- Skills and Methodology
- Conclusions

Leadership

Introduction

Even in periods of recession, most organizations keep looking for better managers.

Universities, corporations, hospitals, and governmental agencies constantly complain about their lack of effective “**leadership**” and the difficulty of obtaining truly effective managers.

Leadership

Introduction

Thus, there is a need to upgrade the managers' managerial and leadership capabilities.



Leadership

Why is Leadership so difficult?

We need to answer the following simple question:

- ★ **Why should leadership be so problematic and good leaders so scarce?**



Leadership

The answer could be the following:

**Leadership is About Bringing
New Realities Into Being**



Leadership

Why is Leadership so difficult?

- ★ Where managers seek to go beyond the obvious and regular models, they will have difficulty in getting help.



Leadership

Why is Leadership so difficult?

- ★ Rather than responding to the reality and complexity, many managers retreat to one or another simplistic but appealing models of managerial role:



Leadership

Why is Leadership so difficult?

1. The all-powerful boss:

Are those managers insisting on complete loyalty and punish the deviants, which never works in a complex institutional world but might succeed in a one-boss operation.





Leadership

Why is Leadership so difficult?

2. The complete bureaucrat:

Are those managers who have learned their textbook lessons well.

They have no flexibility at all, which is far different from the human beings way of life.



Leadership

Why is Leadership so difficult?

3. The sophisticated technician:

Are those managers who are looking for complete and well packed cures to human problems that the bureaucrats ignored in their machine-like precision.

They assume that consultants and business schools turn out ready to install cures for organizational ills, regardless of the type of illness.

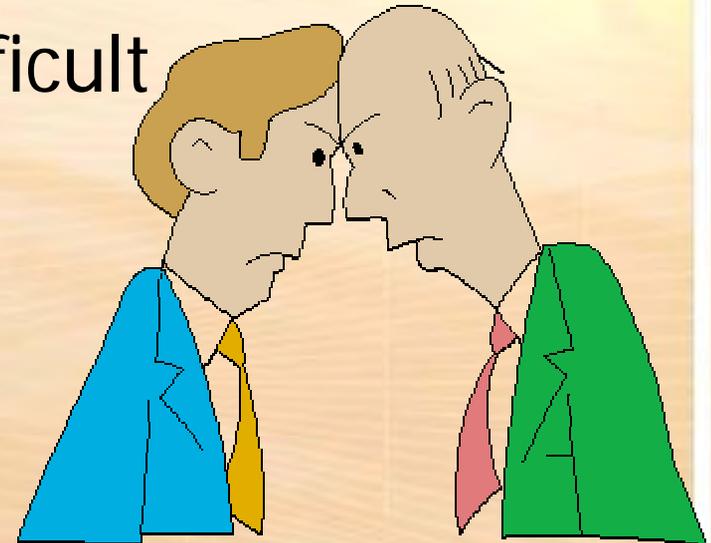
Leadership

Why is Leadership so difficult?

4. The Rejectionists:

Are those managers who are embittered and confused with how difficult organizational life appears.

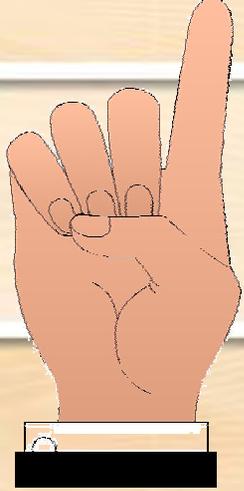
They argue that there are no rules of the game for their crazy, mixed-up organization.



Leadership

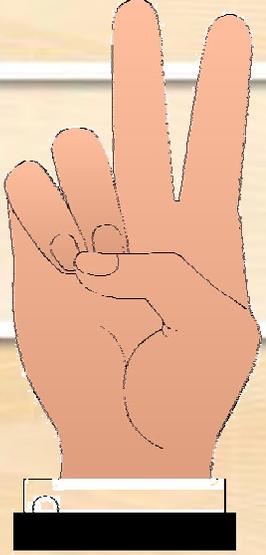
What is needed to be
a good **LEADER?**





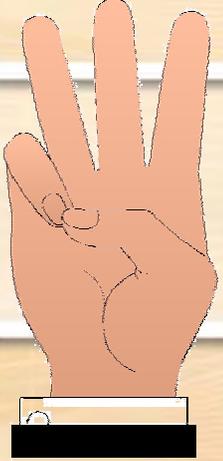
Leadership

1- Personnel skills



Leadership

2- Technical skills



Leadership

3- Established Methodology

Leadership

Skills for a successful leader:

1. Ability

Leaders must demonstrate superior ability, whether it is technical or organizational.



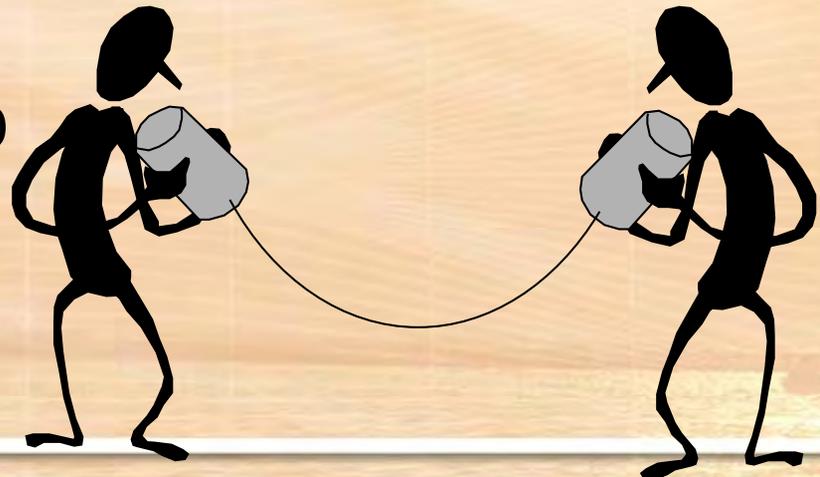
Leadership

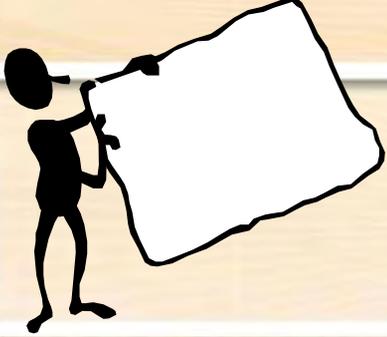
Skills for a successful leader:

2. Credibility

Leaders should know the “rules of the game”, the norms, expectations, and the values of the group to be supervised.

Knowing the norms means being able to communicate..





Leadership

Skills for a successful leader:

3. Representation and Buffering

Nothing substantiates the position of the leader more than his ability to handle external relations.

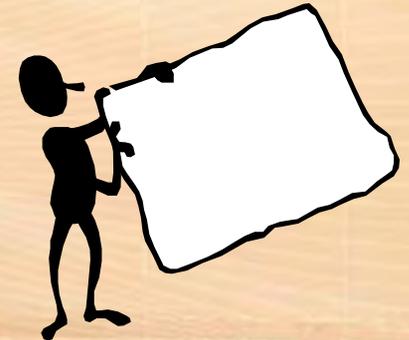
From the view of the subordinates, the leader is the link with the outside world, which directly relates to the management, salary increase and promotions.

Leadership

Skills for a successful leader:

3. Representation and Buffering

Respected, admired leaders are those who can deal profitably with outsiders and bring back benefits and protection to his subordinates.

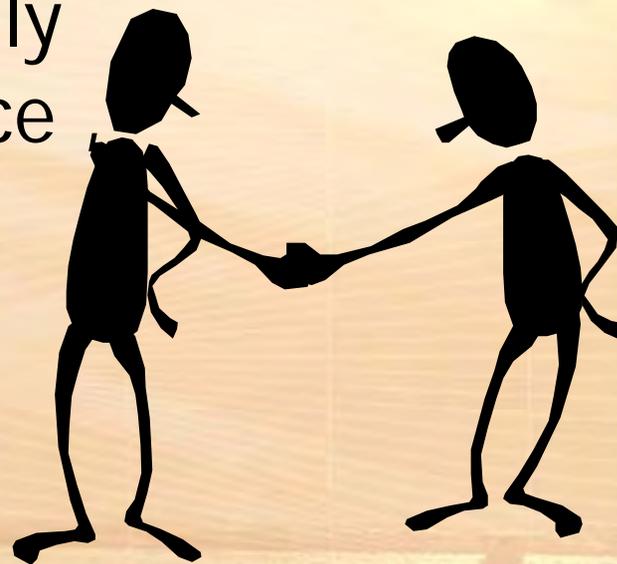


Leadership

Skills for a successful leader:

4. Social Distance

New leaders must successfully manipulate the social distance the gap that separates them from their followers.



Leadership

Skills for a successful leader:

4. Social Distance

- ★ The leaders' ability to Jump into problems and get his hands dirty by doing the work himself instead.
- ★ Having subordinates use the same form of address, typically first names.



Leadership

Skills for a successful leader:

4. Social Distance

- ★ Keeping an open door policy to the subordinates.
- ★ Sharing, eating, parking and other prerequisites.



Leadership

Skills for a successful leader:

5. Insulation from other competing initiations

- ★ The ideal position for leaders is one in which subordinates have no other conflicting initiations.

Leadership

Skills for a successful leader:

5. Insulation from other competing initiations

- ★ This is the theory of so-called total institutions.
- ★ Thus, old habits and relationships should be dropped and only the new modes of behavior and instruction are considered.



Leadership

Skills for a successful leader:

6. Persistence

By persistence we mean simply repetition, clarity of command, self-confident dominance –being able to keep asking, talking, explaining , and demonstrating your ideas.



Leadership

Skills for a successful leader:

7. Practice

Leaders gain their status and responsiveness by getting subordinates used to following their directions.

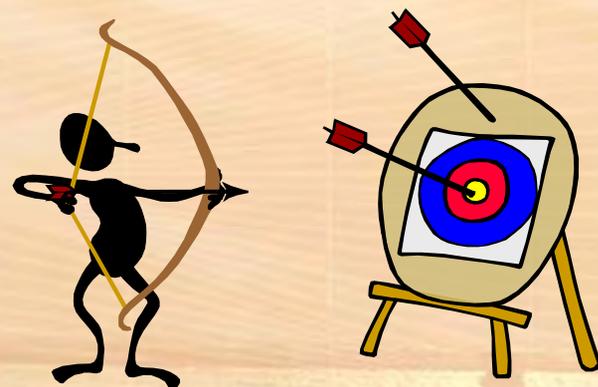


Leadership

Skills for a successful leader:

7. Practice

This is accomplished by gradations: moving from very few to the proper level or frequency and moving from the most obvious, easily accepted areas to the more ambiguous and potentially controversial.



Leadership

Skills for a successful leader:

8. Momentum

Subordinates never want mindless or needless orders from managers who only want to demonstrate authority through commanding deference.

Employees want reasonable autonomy.



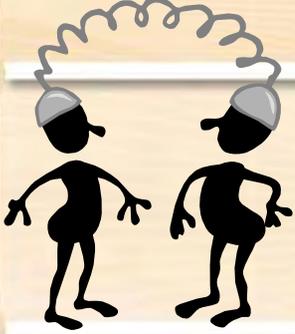
Leadership

Skills for a successful leader:

9. Charisma

Many of us have observed articulate, persuasive leaders, proverbial salesmen who can talk reluctant others into accepting their proposal. This is what we call Charisma, which is an ability to persuade the others with ones ideas without exerting lots of efforts.





Leadership

Skills for a successful leader:

10. Persuasion

This can be done through one of the following elements:

- ★ Seek to establish through mutual give-and-take a common understanding of the nature of the problem and the surrounding constraints. Agreement on the problem is an absolute prerequisite to motivating the search for solution.

Leadership

Skills for a successful leader:

10. Persuasion

- ★ Seek to understand the subordinates' values, interests, anxieties and desires through interviewing, that is letting subordinates talk and explain, which transfer the understanding of the boss to his subordinate and that he is also interested in his needs.



Leadership

Skills for a successful leader:

10. Persuasion

- ★ Seek to redefine the problem in such a way that it is possible for the employees to have some opportunity to contribute to the solution. The degree of participation might have one of the following shapes:





Leadership

Skills for a successful leader:

10. Persuasion

- Decisions made by subordinates.
- Decisions made by subordinates, but only if approved.
- Decisions made by the boss and subordinates.
- Decisions made by the boss, consulting subordinates.

Leadership

Skills for a successful leader:

10. Persuasion

- ★ In many ways, leaders are more like coaches than supervisors: they exhort, urge, cajole, browbeat, and pressure.





Leadership

Skills for a successful leader:

10. Persuasion

- ★ Through their presence, their personal intervention and force of personality, their talking, pleading, and demanding, they try to counteract the various frictions that would slow down or misdirect the activities of other groups.

Leadership

Skills for a successful leader:

11- Coaching

- ★ Effective leaders keep urging on key subordinates to keep fighting, to keep pushing against time to pretend that every one else will be on time, to seek equally satisfactory alternatives when the original plans are no longer feasible.



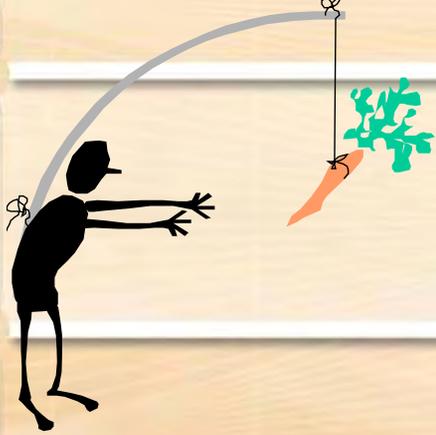
Leadership

Skills for a successful leader:

11- Coaching

- ★ The pressuring includes keeping people from falling back on old, familiar routines and ways of doing business.





Leadership

Skills for a successful leader:

12- Incentives and Motivation

- ★ Social scientists have found that employees are most responsive to incentives that don't depend on a powerful boss's bestowing them as upon dependent subordinates.

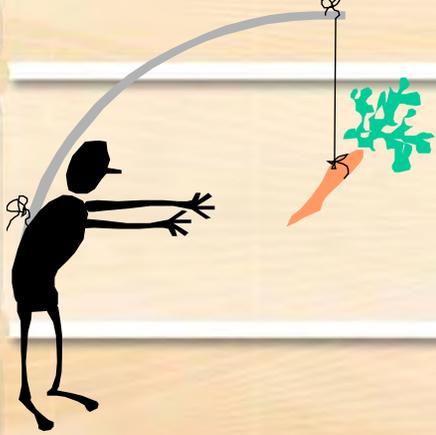


Leadership

Skills for a successful leader:

12- Incentives and Motivation

- ★ Thus, annual wage increase, even merit raises, better working conditions and improved pensions and vacations may be appreciated, but they don't motivate better performance.

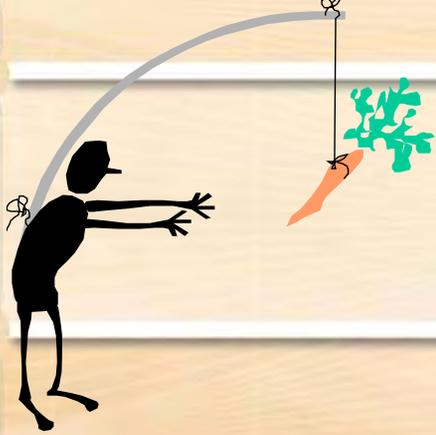


Leadership

Skills for a successful leader:

12- Incentives and Motivation

- ★ The ideal motivator is one that employees control. Thus, many managers are highly motivated and do every thing they can to improve the visibility and effectiveness of their operation because they directly benefit in proportion.



Leadership

Skills for a successful leader:

12- Incentives and Motivation

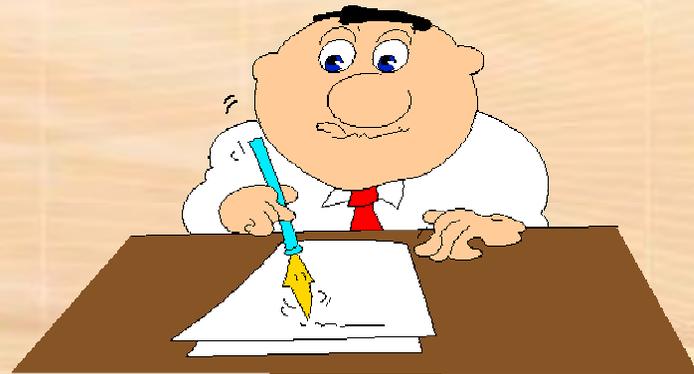
- ★ Thus, putting the employees on a job where they directly benefit in proportion on how effectively they work is the ideal incentive.

Leadership

Leadership in Practice

The Elemental Skills:

- ★ Initiating to all subordinates.
- ★ Getting Subordinates to be responsive simultaneously to the order, which is called "set events"



Leadership

Leadership in Practice

The Elemental Skills:

- ★ This is essential to both reinforcing the position of the leaders and accomplishing the goals of the group. Hence, group response must be preceded by a much higher frequency and intensity necessary to bring the subordinates to a point where they will respond synchronously to the initiation of their leaders.

Leadership

Leadership in Practice

Handling Pair Events

Leaders actively encourage the bringing of problems and requests.

Leaders are responsive to requests for aid, assistance, commiseration.

They are willing to devote the time and to have the requisite social and/or technical skills to satisfy these demands.





Leadership

Leadership in Practice

Handling Pair Events

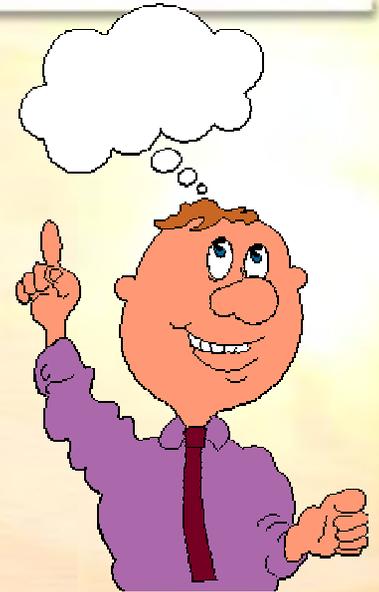
Leaders also appear to have the energy and perseverance to keep circulating among their followers. i.e presence and encouragements. Leaders do more than give information and aid; they dispense adjudications that resolve conflicts and stalemates and relieve pent-up tension among subordinates.

Leadership

Leadership in Practice

Handling Set Events

- ★ The mark of leaders is the ability to redirect the actions and goals of followers.
- ★ Leaders should have the persistence and dominance to keep talking to what at first may be somewhat dubious and easily distracted groups.



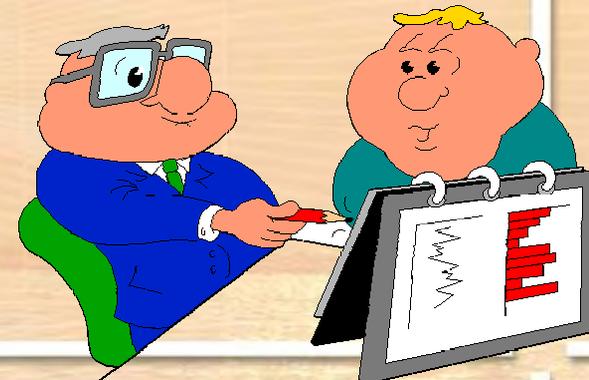
Leadership

Leadership in Practice

Handling Set Events

- ★ They should have the ability to talk down opposition and to speak rapturously and engagingly on the advantages of the new course of action, the problems that to be resolved, the extraordinary gains for all that to be obtained.

They should also use emotional symbols to enhance their responsiveness.



Leadership

Leadership in Practice

Example, in case of a crisis a leader might say:

“ As you all know, we face very serious problems – problems which could destroy us- but they aren't going to, because we will do things together that will enable us to come out stronger than ever. We stand for the best, our hospital is the best, our people are the best and we are going to continue to show the best results because we are the undefeatable”

Leadership

Leadership in Practice

Enhancing order giving:

If the leaders have done their job well, subordinates go into action, simultaneously and synchronously. The chances that a decision from a leader would lead to a successful outcome is enhanced by the leaders' previous behavior:



Leadership

Leadership in Practice

Enhancing order giving:

- ★ Being central to communications, leaders know more than others about the situation and individual capacities.
- ★ The simultaneous, and thus mutually cooperative and complementary response of followers increases the likelihood of their accomplishing the goal, fulfilling the mission.

Leadership

Leadership in Practice

Enhancing order giving:

- ★ The “working up” by the leaders has increased the subordinates’ drive and determination.
- ★ Success breeds success in increasing the self confidence of the subordinates group and the aim to “win”.



Leadership

Established Methodology:

- 1- Scanning**
- 2- Focusing**
- 3- Mobilizing**
- 4- Inspiring**



1- Scanning

- ★ Stakeholders**
- ★ Clients needs**
- ★ Key Trends in the Organization**
- ★ Strengths and weaknesses**

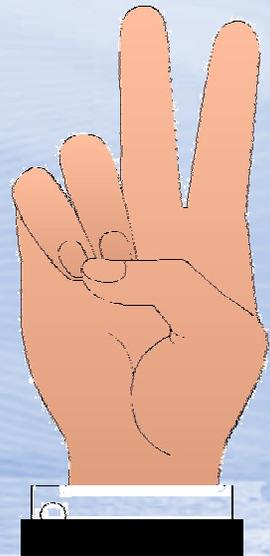
1- Scanning

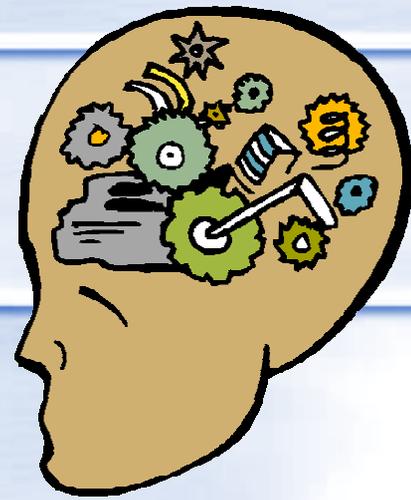
HOW TO DO IT ?



A. Brainstorming

B. Delphi Technique





Brainstorming Risk Events

Brainstorming is probably the most frequently used risk identification technique because **it is popular and fun.**

The objective is to develop a comprehensive list of events **for later analysis.**

Running the Brainstorming session

1. Allow a finite Time.

Assemble members of your project team.

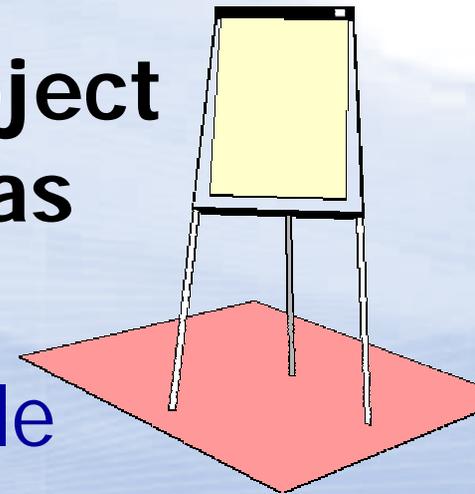
Invite experts from outside if needed.



Running the Brainstorming session

2- The facilitator (you the project manager) jots down all ideas on a flip chart

- ★ Encourage the broadest possible scope
- ★ Don't criticize – just get them all down



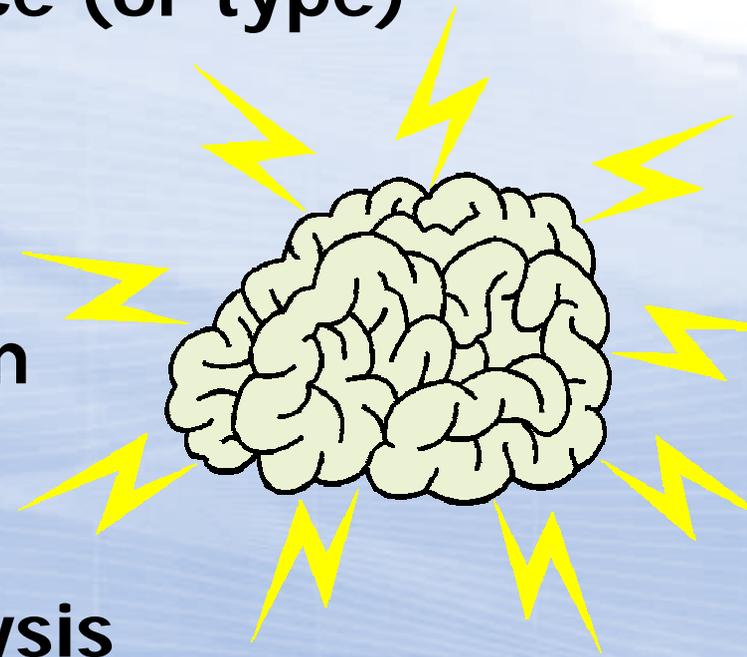
Running the Brainstorming session

3. Now group them by source (or type)

4. Sharpen the descriptions

5. Have the group rank them subjectively

6. Take them away for analysis



SWOT Analysis

SWOT stands for

“**S**trengths,
Weaknesses,
Opportunities and
Threats”

SWOT Analysis

- ★ Ensures review of the project from each of the SWOT perspectives
- ★ Helps to broaden the discussion
- ★ Conduct it as a brainstorming session

B. Delphi Technique

The Delphi technique is a means for reaching consensus among experts.

- ★ **The experts are not co-located**
- ★ **They are identified but participate anonymously**

B. Delphi Technique

- ★ The facilitator distributes information
- ★ Then uses a suitable questionnaire to solicit suggestions
- ★ The submitted responses are distributed for further comment



B. Delphi Technique

When to use the Delphi Technique

- ★ Where the bias in the data must be avoided
- ★ No person may have undue influence over the outcome

It is all very tedious



Leadership

Established Methodology:

1- Scanning – OUTCOME

- ★ Knowledge of internal and external conditions.
- ★ Chain of command and impact

FACTS about Leadership

Leadership must be active, not passive; authority must be exercised to be accepted. The strong, distant, placid, and silent types idealized in fiction are not the leaders of the real world.

IN-HOUSE DECISION MAKING

THE MEETING

- ★ a decision-making body displays a blending of a number of individual talents
- ★ meeting *team* concept



Types of Meetings in Construction

- ★ in-house meetings fact finding decision making, and coordination
- ★ meetings between different organizations



Depending on the purpose of the meetings and the types of people who will be in attendance, the philosophy of conduct at some meetings may be required to be quite different from what it is at others.

Who Should Attend?

- ★ Careful selection of those who will be in attendance is of vital importance to the success of the meeting objective.



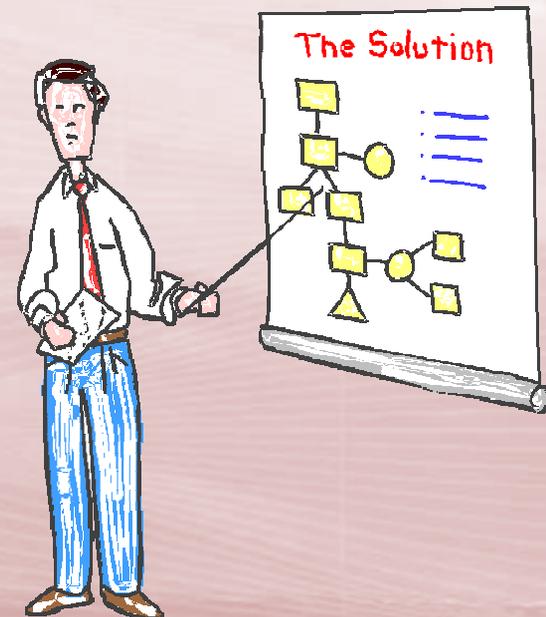
Methods and Techniques

- ★ Take a positive approach.
- ★ Ideas should always be presented in a systematic and orderly fashion.
- ★ Facts must follow a logical course toward the point that you are attempting to put across.

★ Prepare carefully ahead of time.

★ Coordinate the activities of each of the people who are involved.

★ Rehearse the presentation



IN-HOUSE DECISION-MAKING MEETINGS

Meetings are the means of group decision making

group psychological pressures tend to cloud basic issues

it is necessary to understand how groups think, and why



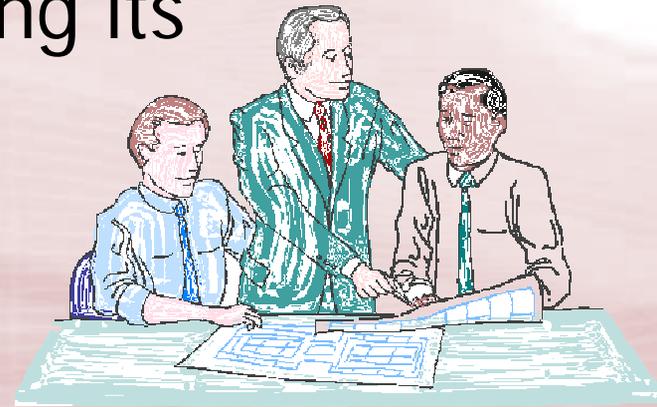
Why group decision making ?

- ★ a group may be less likely than individuals to make bad decisions.
- ★ People are more likely to accept and use decisions that they or their representatives have helped to develop.



Other Group Benefits

- ★ Group inputs are sought
- ★ Responsibility is shared among its members
- ★ Satisfying personal needs
- ★ Two [or more] heads are better than one



The Collective Thinking Problem

The major barriers to effective group problem solving are those conditions that prevent the free expression of ideas in a group.

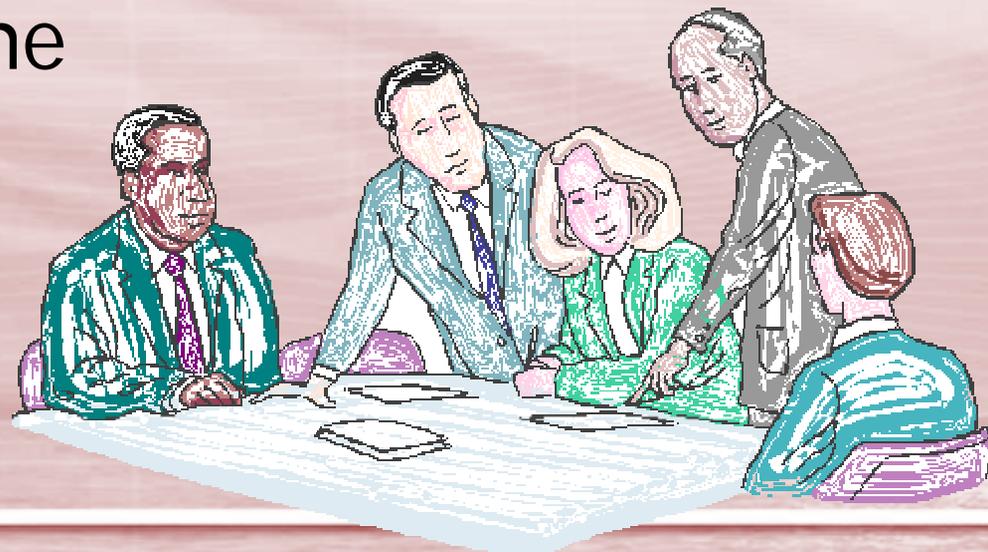


Obvious factors, such as embarrassment and fear of reprisal, tend to restrict free expression of ideas in groups.

Most groups tend to produce unanimous decisions.



The better the group members get along with one another, the less its members will deliberately hold back what they think out of fear of being punished socially for arousing the resentment of the leader or a fellow group member.



A desire to match their opinions and conduct themselves in accordance with each other's wishes often results in their reluctance to use this freedom to express a negative viewpoint.



The danger is not that each will fail to reveal his or her strong objections to a proposal, but that each will think the proposal is a good one without even attempting to carry out a careful evaluation that could reveal grounds for strong objections.

The more *esprit de corps* exhibited by a group of policy-makers, the more likely it is that independent thinking will be replaced by *collective thinking*.



As a group becomes excessively close-knit, collective thinking develops.

The process is characterized by a marked decrease in the exchange of potentially conflicting data and by an unwillingness to examine carefully such data when they surface.



This type of group process emphasizes team play at all costs and often increases the probability that the collective attendees will tend to seek unanimity, become overoptimistic, and exhibit a lack of vigilance.

This often results in a strategy that is ineffective and not in keeping with existing realities.

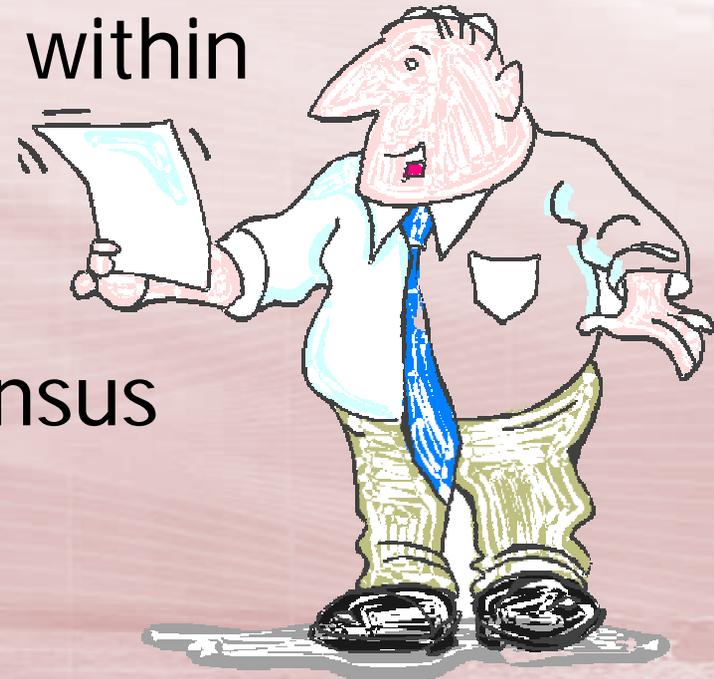
Symptoms of Collective Thinking

1. The illusion of togetherness
2. A view of the "opposition" as generally inept, incompetent, and incapable of countering effectively any action taken by the group
3. Self-censorship of group members



Symptoms of Collective Thinking

4. Collective rationalization
5. Self-induced constraints within the group
6. Reinforcement of consensus and direct pressure



Symptoms of Collective Thinking

7. An expression of self-righteousness

8. A shared feeling of invulnerability



Preventing Collective Thinking

1. Leader encouragement
2. Diversity of viewpoints.
3. Legitimized disagreement and skepticism
4. Idea generation versus idea evaluation



Preventing Collective Thinking

5. Advantages and disadvantages of each solution
6. New approaches and new people





Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Focusing

Workshop 1

December 2003

2- FOCUSING

Table of Content - Focusing

- Identifying Critical Challenges:

**** Steps and ratings***

- Planning a Strategy

**** Importance and basic steps***

- Setting Priorities

**** What , When and Why***

- Outcome

Established Methodology:

2- Focusing – OUTCOME

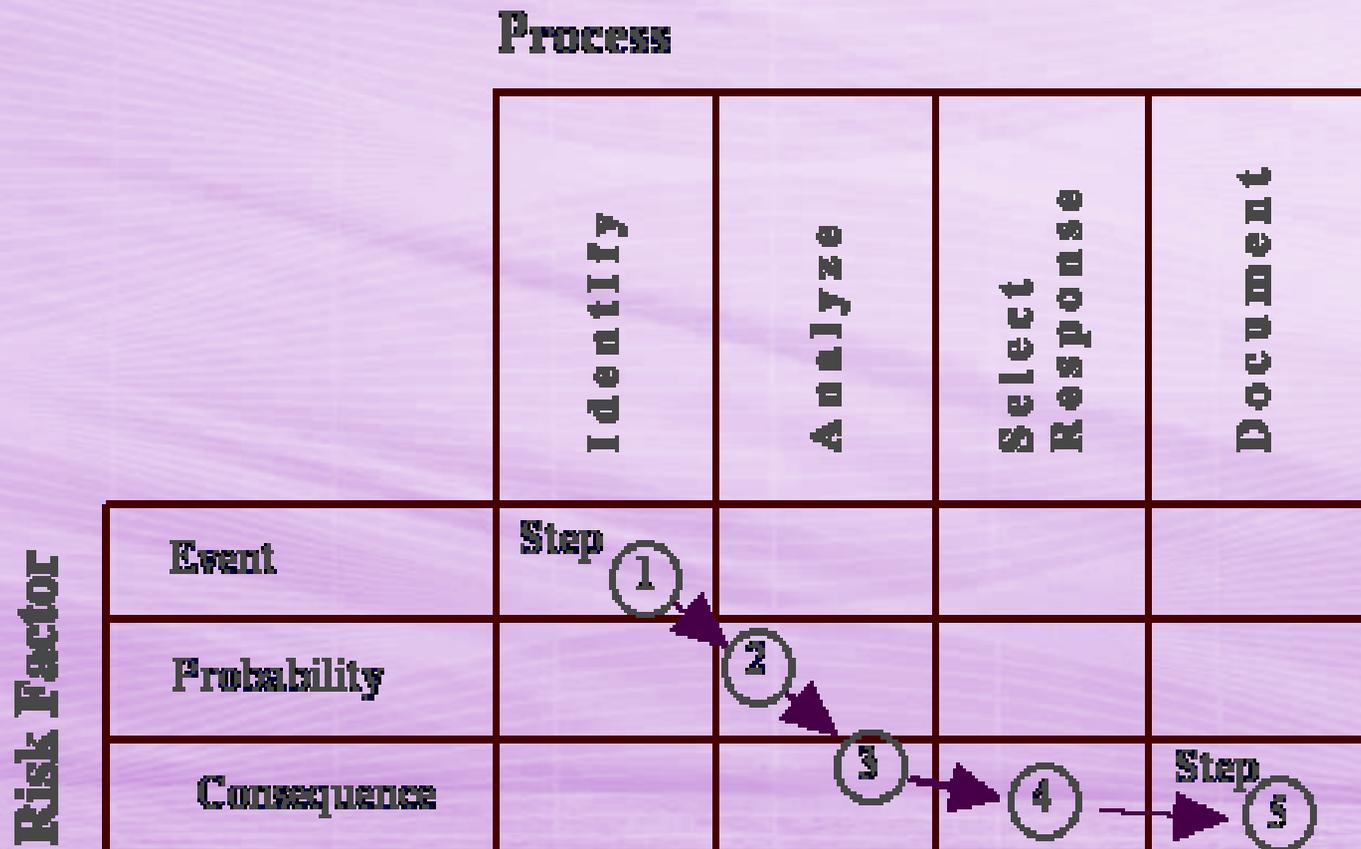
The organization has a mission, strategy, and priorities.



Identifying Critical Challenges

Challenges Analysis

A simple project risk analysis consists of five steps:



The Risk Event Status or Rating Matrix

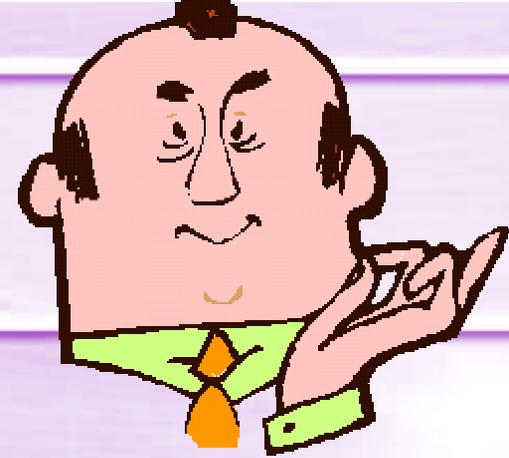
Risk Score for a Specific Risk					
Probability	Score = P x I				
0.9	0.05	0.09	0.18	0.36	0.72
0.7	0.04	0.07	0.14	0.28	0.56
0.5	0.03	0.05	0.10	0.20	0.40
0.3	0.02	0.03	0.06	0.12	0.24
0.1	0.01	0.01	0.02	0.04	0.08
	0.05	0.10	0.20	0.40	0.80
	Impact (Ratio Scale)				

Red = serious concern; **Grey** = concern; **Green** = awareness

Planning a Strategy

- ★ Introduction
- ★ Why is planning important?
- ★ Common problems arising from ineffective planning
- ★ How to ensure planning is useful and contributes to
- ★ effective results?
- ★ The Basic Planning Steps

Planning a Strategy

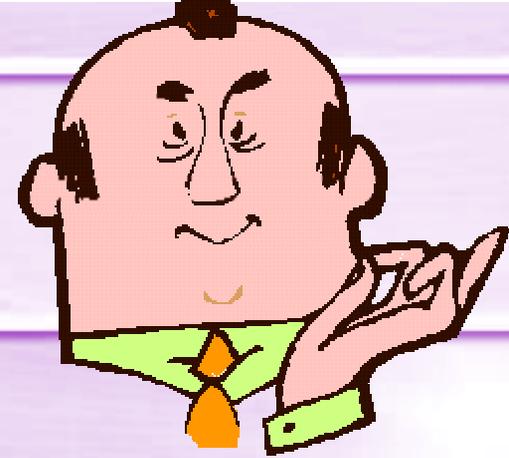


Introduction

What do we use planning and evaluation for?

- ★ Planning and evaluation are vital for organizations. Planning is a process of deciding in advance where one wants to get to (one's goal) and how one will get there. Planning helps to decide what that goal should be and how to achieve it.

Planning a Strategy

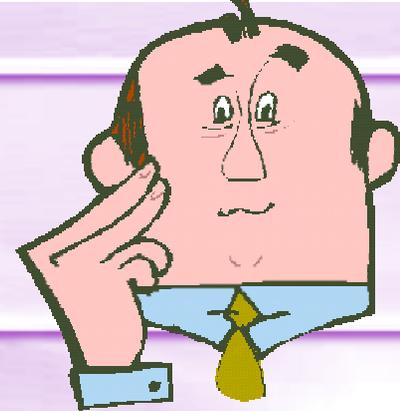


Introduction

What do we use planning and evaluation for?

- ★ Evaluation enables a planner to judge whether he has had the impact he planned, contributed to changing the situation he wanted to change and whether or not he achieved his goal. It enables him to know how well he is doing and to learn from this.

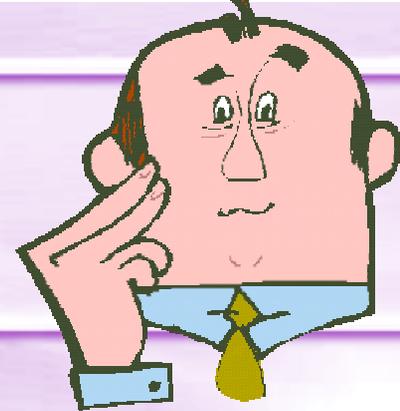
Planning a Strategy



Why is planning important?

- ★ It helps us to identify our goals clearly. It makes us decide clearly and concretely what we need to do to have the effect on society that we want.
- ★ It helps us make sure that we all understand our goal and what we need to do to reach it by involving everyone in the planning process.

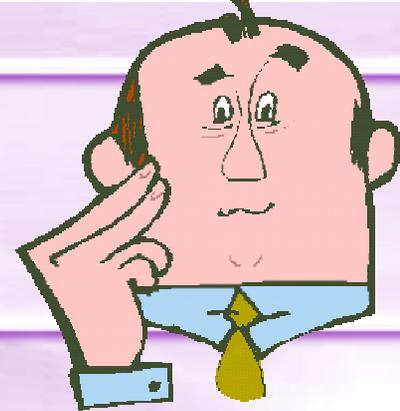
Planning a Strategy



Why is planning important?

- ★ It makes us all work in a goal-oriented way rather than in a loose or ad-hoc way where we just respond to issues and crises with no clear plan or goal.
- ★ Planning helps us see in advance those things that can help us achieve our goal and those things that can prevent us from achieving our goal and work out what to do about them.

Planning a Strategy



Why is planning important?

- ★ Planning helps us to be accountable for what we do.
- ★ Planning helps us decide how best to use our resources (people, time, money, information, equipment) so that they make the most significant contribution to achieving our goal.
- ★ Planning lays the basis for us to assess and evaluate our achievements effectively.

Planning a Strategy



Common problems arising from ineffective planning

People don't all understand the plans in the same way and different views on the most useful approach keep coming up while one is trying to implement – confusion and conflict can result as people pull in different directions or have different views on basic strategic issues.

Planning a Strategy



Common problems arising from ineffective planning

Different people have different perceptions of what successful achievement means – conflict, confusion and lack of accountability can result as differences emerge.

Planning a Strategy



Common problems arising from ineffective planning

It is not clearly agreed who should mainly benefit from one's work and whose needs, interests and concerns should be prioritized – this can mean that the interests of those who already have power and influence dominate instead of those whose power and influence over their own lives one hope to strengthen.

Planning a Strategy



Common problems arising from ineffective planning

Things change and the plans no longer seem relevant – one abandon the plans and react in ad hoc and unstrategic ways to events or one stick to his plans and continue with what are now not very useful activities.

Planning a Strategy



Common problems arising from ineffective planning

The difficulties one experiences, arising from the complexity of his goals and the number of other groups and circumstances that can affect his success, lead to demoralisation and a sense of powerlessness to effect meaningful change.

Planning a Strategy



Common problems arising from ineffective planning

One is not able to say what he has achieved, only what he has done.

Planning a Strategy



Common problems arising from ineffective planning

Different understandings of why one adopted specific approaches and what he was intending to achieve mean that learning is limited – one can end up making excuses and blaming one another rather than using the lessons they learned to improve their achievements.

Planning a Strategy

All these problems can lead to a waste of precious resources needed to improve the lives of people and to weakening the confidence others have in the organization.

Planning a Strategy



How to ensure planning is useful and contributes to effective results?

- ★ Planning and evaluation must be participative
- ★ Planning and evaluation must be systematic
- ★ All planning should be strategic
- ★ Planning must include agreements about how and when one will evaluate progress and achievements

Planning a Strategy



How to ensure planning is useful and contributes to effective results?

- ★ Effective planning requires a major commitment from everyone
- ★ Planning and evaluation must be thought of as a cycle of learning and improvement, not a straight line from A to B.

Planning a Strategy



The Basic Planning Steps

- ★ The following are the 8 basic steps that are useful in almost any kind of planning process.
- ★ This process should be used as part of the cycle of planning that enables ongoing learning and improvement:



Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

- ★ It is important to prepare well for any planning process.
- ★ planning should not be seen as something one do before starting on the real work, but as part of " the real work" itself. It takes up time, energy and other resources. It plays a crucial role in laying the basis for effective ongoing thinking, action and achievement.

1



Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

One of the mistakes many professionals make is to underestimate the amount of time and commitment necessary for effective planning. This commitment will need to come from staff and all other employees whose participation one decide is necessary to enable successful implementation and results.





Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

The following are important issues to be addressed in this step:

- ★ What kind of planning do a leader need to do?
- ★ How much time should a leader give to each step?
- ★ How much time and other resources are needed for the whole planning process?





Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

The following are important issues to be addressed in this step:

- ★ Do the leader need more information on past experience, achievements or the situation that he is hoping to influence before starting the planning and, if so, who will get it, how will they get it, where and from whom?





Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

The following are important issues to be addressed in this step:

- ★ Who are the key participants?
- ★ How important are their involvement to the successful implementation of the plans?
How important is it that each main participant understands and is willing to implement the planning decisions?





Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

- ★ How will he gets the commitment to the planning process he needs from the top management?
- ★ How should the top management be prepared so that they can participate effectively? What information will they need beforehand?
- ★ Do a leader need a planning committee or group to ensure the process runs smoothly?

1



Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

- ★ When will the planning begin and what target dates should be set for the completion of each step?
- ★ Who will facilitate each session? Who will keep and circulate a record of the discussions? How soon after each step must the record be circulated?

1



Planning a Strategy

Step 1: Preparing to plan – ensuring commitment

- ★ What other tasks need to be done, by whom and by when?

After answering all these questions one is ready to start the actual planning process.





Planning a Strategy

Step 2 : Analyze the situation and needs

This step involves collecting and analyzing information needed to decide on a goal and a purpose that is:

- ★ Relevant to the target short-term/Long-term goal(s);
- ★ Realistic in terms of what is possible and likely to make a difference; and
- ★ The most effective and appropriate contribution given the current situation a leader wants to change.

Planning a Strategy



Step 3 : Prioritise and select the Goal and Purpose

Deciding on a goal is important because this tells us what change in people's lives we hope to contribute to bringing about. A goal is a clear statement of the future situation one would like to come about. Goals are usually longer-term aims that any organization cannot hope to bring about alone but will make a significant contribution to helping bring about.



Planning a Strategy



Step 3 : Prioritise and select the Goal and Purpose

They tell why and what to do. Goals are also the final basis on which a leader evaluates what have been achieved. When one is developing a strategy for his organization, this is a very important strategic decision.



Planning a Strategy



Step 3 : Prioritise and select the Goal and Purpose

It is the vision of what one would like to see that will guide everything else one do. All further programme or project planning must be relevant to helping bring this about.

3

Planning a Strategy



Step 3: Priorities and select the Goal and Purpose

Once a leader knows what his goal is, he needs to decide on the purpose.

3

Planning a Strategy



Step 3 – Priorities and select the Goal and Purpose

The purpose mainly addresses the reason of the whole plan and in it, he will determine what contribution will be made to achieving the goal.

3

Planning a Strategy



Step 3 : Priorities and select the Goal and Purpose

The purpose is a clear and concrete statement of what the leader undertake to achieve. The purpose should be something the leader can realistically achieve as a result of his work. Agreeing a purpose is making a clear commitment to achieving this result.

3

Planning a Strategy



Step 4 : Develop Clear Specific Objectives

Objectives are concrete results a leader need to achieve in order to reach the purpose.

4

Planning a Strategy



Step 4 : Develop Clear Specific Objectives

Objectives should be as clear and specific as possible. They should state the result a leader aim to achieve, not what he will do to achieve it.



Planning a Strategy



Step 4 : Develop Clear Specific Objectives

This helps him on what the effect of his work should be, not only on his activities. It also allows him to evaluate what was achieved in terms of changes in the real world, not just what he did. Objectives should be more specific and concrete than the purpose and should be relevant to achieving that purpose.

4

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

This step involves trying to find the best way of achieving the objectives.

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

Strategy is the choice one make about the best approach to getting something done. This is a very important step. It enables a leader to avoid just assuming that there is a right way of getting something done and forces him to look at alternatives that he may not have considered properly before.

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

This is very important if he wants to find new and more effective ways of doing things. Just doing things the way he always do them, may not be strategic. one won't know unless he deliberately think of other options and test them out with open minds.

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

The biggest mistakes and waste in development work are made by organizations that do not keep testing their thinking to come up with better and more relevant strategies.

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

In this step, a leader will use the deeper understanding of the problem and the top management needs developed in the needs Analysis to decide: What are the alternative ways one could use to achieve each objective?

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

- ★ What criteria will be used to assess each strategy (e.g. relevance, realistic etc) in order to choose the most effective and realistic alternative?
- ★ Based on these criteria, what is the most effective strategy for achieving each objective?

5

Planning a Strategy



Step 5: Identify Alternative Strategies and Select the Most Effective Strategy

What external conditions will need to exist for the leader to effectively implement each strategy? How important are they to the strategy succeeding? How likely are they to happen? Can one do anything to influence the situation so that these conditions exist?

5

Planning a Strategy



Step 6 – Plan implementation

- ★ **What** major activities will be needed to implement each strategy?
- ★ **Who** will be responsible?
- ★ By **when** should activities be completed? What deadlines should be set?
- ★ What specific **resources** will be needed for the activities required to achieve each strategy? (Resource allocation)



Planning a Strategy



Step 7 : Plan for evaluation

- ★ This step involves planning how a leader will evaluate his progress and what has been successfully achieved.
- ★ This needs to be done at the planning stage so that it can guide implementation by ensuring a clear record of agreements about what successful achievement means.



Planning a Strategy



Step 7 : Plan for evaluation

- ★ It helps to clarify the plans by making sure that everyone understands what a leader intend to achieve in the same way.
- ★ It also ensures he has a clear and agreed basis for assessing what was actually achieved and his progress along the way.



Planning a Strategy



Step 7 : Plan for evaluation

- ★ If he has followed the systematic approach to planning outlined in the earlier section, he will already have a very useful basis for monitoring his progress and evaluating his achievements.



Planning a Strategy



Step 7 : Plan for evaluation

In this step he will use his needs analysis and overall plan to finally decide:

- ★ What criteria or indicators he will use to evaluate progress and achievements in relation to his goal, purpose and specific objectives ;



- ★ When he will monitor progress and evaluate achievements;

Planning a Strategy



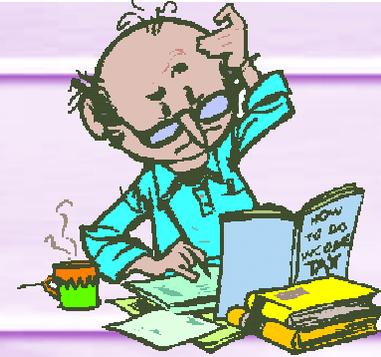
Step 7 : Plan for evaluation

- ★ Where and from whom he will get the information he needs;
- ★ Who should be involved in monitoring progress and evaluating achievements; and
- ★ How he will collect the information he will need.



Once one have made these decisions, he has completed the planning process

Planning a Strategy

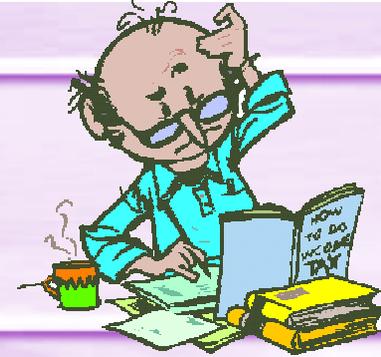


Step 8 - Summarize the final plan

- ★ It is useful to summarize the final plan .
- ★ If he has done this all the way along , he should have a useful record of his discussions that he can use to:
- ★ Check his thinking and whether it all makes sense;
- ★ Keep a clear record of decisions;
- ★ Guide implementation;



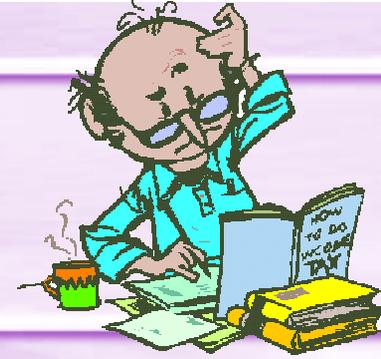
Planning a Strategy



Step 8 - Summarize the final plan

- ★ Monitor external conditions and make adjustments if his assumptions do not prove to be accurate;
- ★ Explain his planning to donors or others whose assistance and support his decide to request;

Planning a Strategy



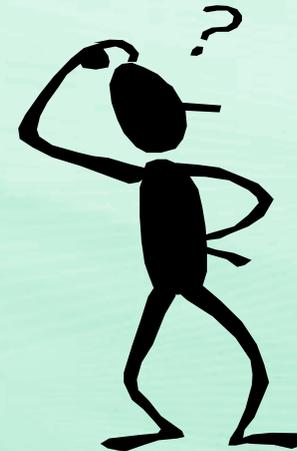
Step 8 - Summarize the final plan

- ★ Evaluate progress and achievements; and
- ★ Check his previous thinking, when he starts the next planning process, and improve it based on the learning he has done in the implementation and evaluation phases.

Prioritization

what is prioritization ?

- ★ superiority in ranking
- ★ listing or rating in order of priority
- ★ a preferential rating
- ★ Priority vs. Rationing
 - rationing means:
 - to distribute equitably
 - to distribute as rations

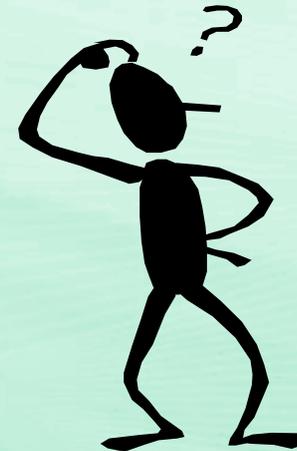




**prioritization
and rationing
must be used
with each other**

When do we need ?

- ★ In strategic planning
- ★ In resource allocation



In strategic planning



- ★ needs analysis

- then mission and vision statement

- ★ SWOT analysis

- ★ strategic formulations

- ★ setting objectives and activities

Why do we need ?

- ★ We don't have enough resources !
- ★ We can't solve most of problems !
- ★ Most of problems are solved with difficulty !
- ★ Expensiveness of problem solving in most problems !



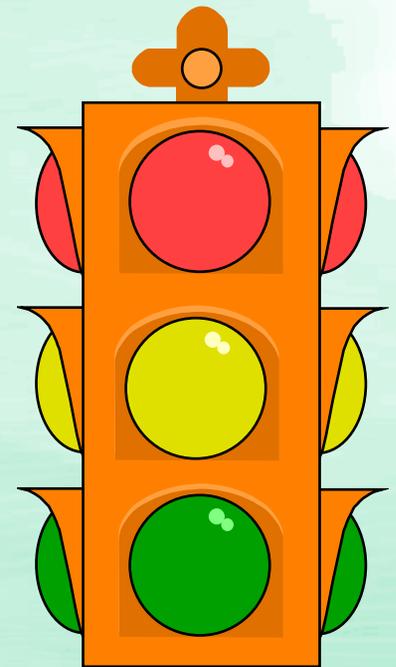
Main criteria

- ★ efficacy
- ★ efficiency
- ★ effectiveness
- ★ benefit



Needs and SWOT analysis criteria

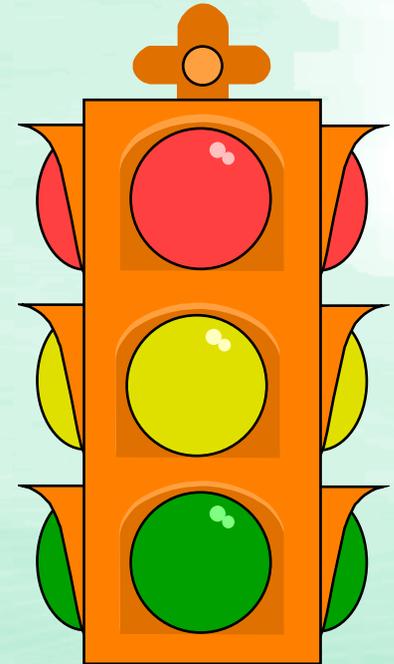
- ★ degree of effect on health condition
- ★ incidence and prevalence
- ★ degree of organization responsibility
- ★ customers and stakeholders



A.C.C.E.P.T.

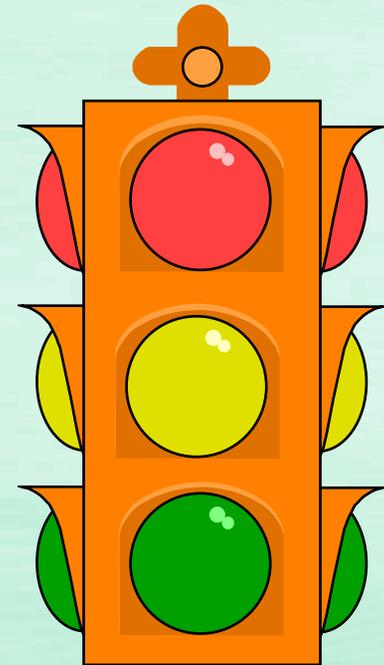
Mostly in strategies

- ★ Attainability
- ★ Costing
- ★ Complication
- ★ Efficiency and Effectiveness
- ★ Popularity
- ★ Time



Criteria Mostly in Objectives

- ★ accessibility
- ★ measurability
- ★ executability
- ★ costing
- ★ efficiency
- ★ effectiveness



Factors effect prioritization in health system

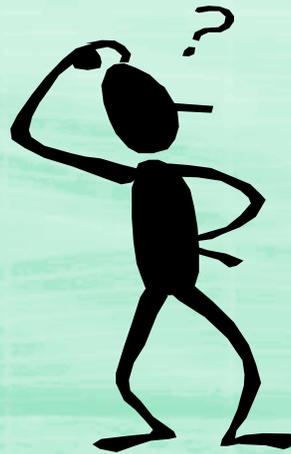
- ★ Public - private partnership
- ★ Financial Program
- ★ Health Insurance
- ★ National Strategies and Policies
- ★ Burden of disease
- ★ Efficiency – Equity

Then

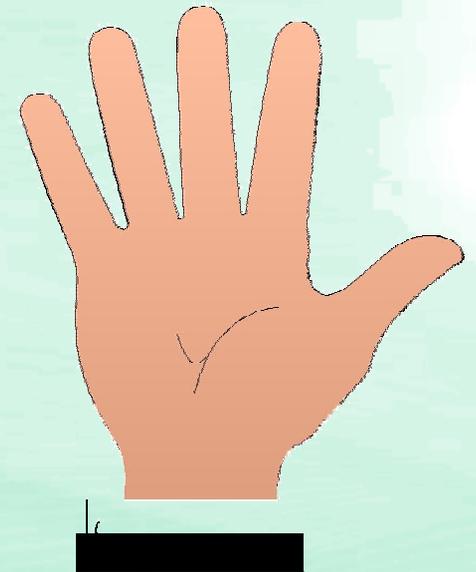
prioritization
planning is a

strategic planning

What is problems in prioritization?



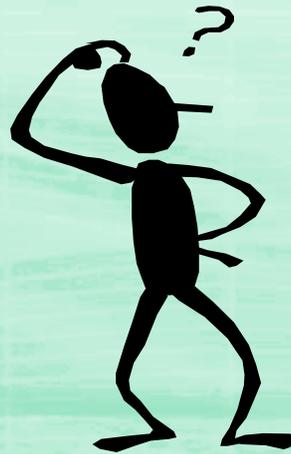
- 1- Lack of Resources
- 2- Inequitable Distribution
- 3- Rising Expenditures
- 4- Lack of Co-operation
- 5- Inefficiencies in Provision



Is It Desirable?

- ★ **Equity Considerations**
- ★ **Impact On Health Sector**
- ★ **Stakeholders` Interests**
- ★ **History, Culture, Societal & Values**

What is the effects of
prioritization?





- 1- More Government resources**
- 2- Apply formally for external grants and regional support**
- 3- Informally acquire more resources**
- 4- Redirect the Service need**
- 5- Focus on the Best Buys**



- 6- Reduce the Scope and Scale of Specific Objectives**
- 7- Enlarge the Objective**
- 8- Use present resources better**
- 9- Prevention the need**
- 10- Improve Efficiency**



**11-Improve Management
Structures and Processes**

**12- Disinvest in Inefficient
Services**

13- Increase Workloads



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Managing relationship with others

Workshop 1

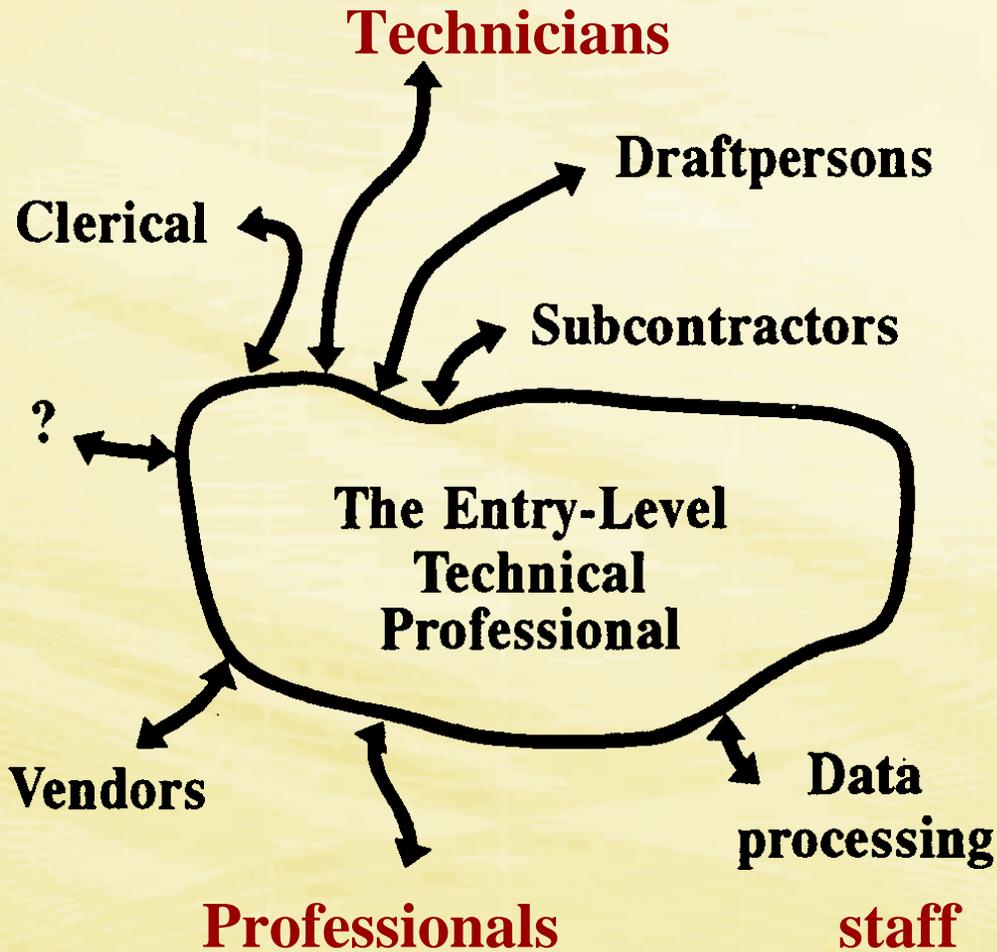
December 2003

**Management Of Relationships
With Others In Meetings And
Elsewhere**

Contents - MANAGEMENT OF RELATIONSHIPS WITH OTHERS IN MEETINGS AND ELSEWHERE

- ★ Types of People
- ★ Maslow's Hierarchy of Needs
- ★ Theories X and Y
- ★ Delegating
- ★ Managing Meetings
- ★ Appreciating and Working with Support Personnel
- ★ Managing Your Boss
- ★ Caring isn't Coddling

- ★ You are beginning to have opportunities to "manage" other people, or at least some of the efforts of other people.
- ★ As suggested by the next figure, you are increasingly interacting with clerical staff, technicians, clients, data processing staff, and vendors.



Early opportunities to interact with others

TYPES OF PEOPLE



Within your organization and among the people you serve, you are likely to encounter:

- ★ People who make things happen, who watch things happen, and who ask what happened.

TYPES OF PEOPLE

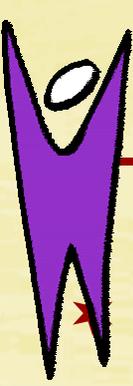


- ★ Risk takers, caretakers, and undertakers.
- ★ Individuals who are on top or on tap.
- ★ Those who see "it" as an opportunity or see "it" as a problem. Winners and losers.

TYPES OF PEOPLE

- ★ Proactive people and reactive people.
These two approaches are exemplified by typical expressions used by proactive and reactive individuals as shown in next figure:



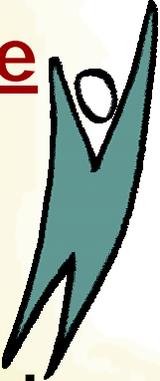


Reactive Language

- ★ There's nothing I can do.
- ★ That's just the way I am.
- ★ He makes me so mad.
- ★ They won't allow that.
- ★ I have to do that.
- ★ I can't.
- ★ I must.
- ★ If only

Proactive Language

- ★ Let's look at our alternatives.
- ★ I can choose a different approach.
- ★ I control my own feelings.
- ★ I can create an effective presentation.
- ★ I will choose an appropriate response.
- ★ I choose.
- ★ I prefer.
- ★ I will.



Reactive and proactive language

- ★ You must try to understand the needs and motivations of the people around you, particularly those with whom you must work to carry out your responsibilities.
- ★ Although you will not share much of what you hear and see in terms of personal philosophy, try to understand and respect the individuals who hold those philosophies.
- ★ Seek first to understand, then to be understood.

Maslow's Hierarchy Of Needs

Maslow's hierarchical model helps managers understand the basic drive or motivation of people around them, including those with whom they have supervision responsibilities and those who supervise them.

Maslow envisioned five levels of needs, any one of which may apply to any individual at any time:

★ **Physiological needs:**

basics such as food and shelter.

★ **Safety and security:**

being physically, psychologically, and economically safe and secure.

Maslow envisioned five levels of needs, any one of which may apply to any individual at any time:

★ **Belonging:**

Individuals want to be accepted as part of a group, feel wanted and appreciated, and give and receive affection.

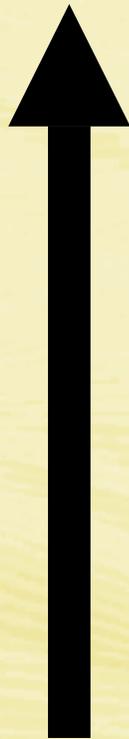
Maslow envisioned five levels of needs, any one of which may apply to any individual at any time:

★ **Esteem:**

having self-respect and the respect and recognition from others.

★ **Self-fulfillment:**

or self-actualization-the idea of thinking and feeling that one has fully realized one's potential.



Self-fulfillment

Ego
Needs

Esteem

Belonging

Lower
Order
Needs

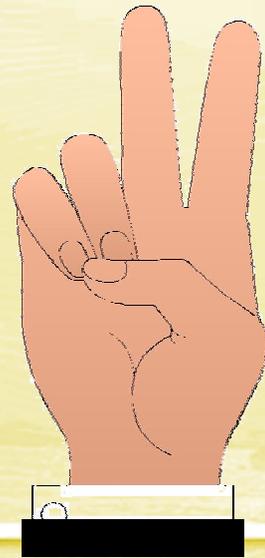
Safety

Physiological

Maslow's hierarchy of needs

Theories X And Y

Two fundamentally different perspectives, referred to as theory X and theory Y, bracket the range of attitudes towards work.



Theories X And Y



Properties of Theory X people:

- ★ They dislike and avoid physical and mental work.
- ★ They hate work and want mainly security.
- ★ They will work in response to threats, coercion, control, and close direction, and they must be constantly reminded that their security is at risk.
- ★ Theory X people must be watched and controlled.

Theories X And Y



Properties of Theory Y people:

- ★ Theory Y assumes that physical and mental work are natural-as natural as play and leisure.
- ★ Theory Y people want to contribute by assuming responsibility, exercising self-discipline, working hard and smart, and putting something of themselves into the product or service.

Theories X And Y



Properties of Theory Y people:

- ★ They want to understand, support, and become active participants in the mission, objectives, and efforts of the group.
- ★ Accordingly, theory Y people respond very positively to rewards for and recognition of achievement.

Theories X And Y



Properties of Theory Y people:

- ★ Theory Y assumes that most people possess a wealth of intelligence, creativity, imagination, and energy. When released in the work environment, these resources bring individual satisfaction and organizational success.

Perspective

- ★ Experience suggests that each person will tend to favor either theory X or theory Y; that is, an individual is likely to be closer to one of the two ends of the available spectrum.
- ★ Furthermore, the majority of individuals probably prefer theory Y.
- ★ The ultimate test of one theory over the other for a particular work environment is the product produced.

Perspective

- ★ A theory Y environment will tend to be supportive of two-way communications, whereas a theory X environment will tend toward one-directional (top down) communication.
- ★ Incidentally, a theory Y manager may appear to be a theory X manager because he or she is a poor communicator.

Perspective

- ★ A theory Y manager with poor communication skills could be viewed as a theory X manager and in turn fail to effectively utilize the resources, particularly the theory Y adherents, within his or her part of the organization.

Perspective

- ★ In this environment, the professional staff receives very heavy assignments often at odds with their basic interests and talents because the manager assumes that everyone is totally engrossed in all aspects of the organization and fails to obtain input from the people who make up the organization.
- ★ Furthermore, such a manager typically fails to communicate appreciation for efforts expended and tasks completed.

Applications of Theory X and Theory Y Knowledge

Theories X and Y can help you understand the responsiveness or non responsiveness of others to typical interpersonal situations.

For example, a theory X manager, because he or she is not satisfied with the progress being made by a supervisee who happens to be a theory Y adherent, threatens to discharge the supervisee. The theory Y individual does not respond with the expected fear, but instead is insulted and disappointed.

Probable dominance of theory Ys

- ★ The vast majority of junior-level staff wants to learn, work, contribute, and succeed, that is, they were primarily adherents of theory Y.
- ★ Unfortunately, much of what junior-level staff offer and aspire to is wasted because of poor management practices.

Probable dominance of theory Ys

- ★ If the on-the-job training and orientation were virtually nonexistent in the organizations, then, the "blind lead the blind," that is, young employees who have little or no training or orientation informally "train" and "orient" new personnel.

DELEGATING



- ★ Delegating means to legitimately assign part of your tasks to someone else.
- ★ Properly done, the delegator retains overall responsibility, because the original assignment part of which has now been delegated was given to him or her, while giving up some of the authority.

DELEGATING

- ★ When called to task for a deficiency in the overall assignment, the delegator should never blame the delegatee.
- ★ Delegation is not giving orders, that is, holding back authority while giving someone else responsibility. Delegating is also not dumping, that is, getting rid of responsibility, especially when the going gets tough.

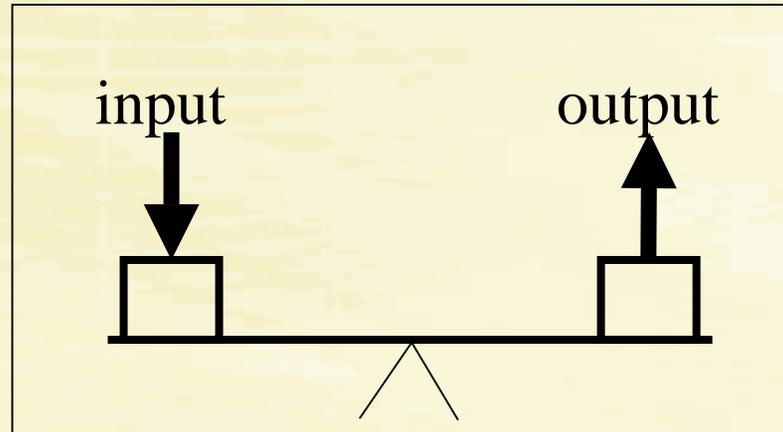
Reasons to Practice Effective Delegation

- ★ Delegation frees up experienced people to take on new responsibilities, projects, and challenges
- ★ Delegating gives other members of the organization an opportunity to learn, grow, and contribute in new ways to the work of the organization.

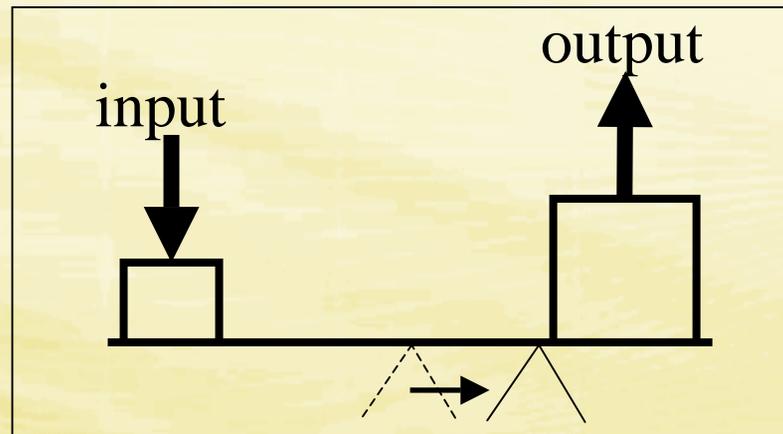
Reasons to Practice Effective Delegation

- ★ Delegation helps individuals learn from others with, surprisingly, the learning often flowing from the actions of the subordinates to their superiors. Whenever an "old" or routine task is given to a new person, fresh and improved approaches are likely to result.

**Without
Delegation**



**With
Delegation**



Delegating as Leverage

Reasons to Practice Effective Delegation

- ★ Delegation reduces tasks' costs, that is, it tends to push the cost of each task to the lowest level possible consistent with the required results.
- ★ Delegation builds resiliency into an organization. By spreading understanding of tools and techniques to other members of the organization, more people know how to do more things.

Reluctance to Delegate

- ★ In spite of all the good reasons to delegate, some young technical professionals never learn how to do it.
- ★ This failure hampers the success of the organization and hinders the individual's advancement.
- ★ Entry-level engineers may be reluctant to delegate some of their tasks to others for one or more of the following reasons:

- ★ Delegation often requires an up-front investment of time and energy. The young professional may believe that he or she simply doesn't have the time to provide basic information required to delegate tasks to others.
- ★ Excessive pride of authorship or ownership or perhaps even arrogance. That is, the young professional feels that he or she is really the only one who knows how to do the work correctly.

★ You may feel that you have no one to delegate to. As an entry-level professional, you probably do not have supervisory responsibility for full-time personnel in your organization.

But, even the entry-level individual has opportunities to "manage" some of the efforts of other members of the organization such as clerical staff, technicians, and draftpersons. They are your potential delegates.

- ★ Delegation might be frustrated by the potential delegator's poor organizational and communication skills needed to explain what needs to be done and to suggest ways to do it.
- ★ Delegation may be frustrated by fear of losing knowledge-based job security.

- ★ Fear of appearing lazy or incompetent may inhibit delegation
- ★ Fear of advancement or you are concerned that advancement may occur too rapidly as you shed tasks to others and free up your time to take on new responsibilities.

Delegation Isn't Always Down

- ★ Delegation is usually downward in the organizational structure, that is, from a supervisor to a supervisee.
- ★ However, lateral and upward delegation can be an effective way to make optimum utilization of an organization's human resources.

- ★ **For example**, assume that the young technical professional has the responsibility to draft a report on a subject that is new to him or her.
- ★ In order to start with an overall structure that incorporates experience already within the organization, the young professional might ask a senior person to prepare an outline based on that senior person's experience.

- ★ Similarly, the young professional might delegate the task of preparing minutes of a meeting to someone on his or her level who has talent for preparing effective minutes.
- ★ In all cases, the delegator, while giving authority to individuals above and next to him or her in the organizational structure, retains responsibility for the delegated tasks.

Delegation Tips

- ★ Assume that the delegator is a theory Y person and is about to delegate tasks to another person in the organization.
- ★ If the potential delegatee is also a theory Y person, he or she will welcome the opportunity to learn more about how the organization does things and to make a higher-level contribution to the organization's objectives.

- ★ Provide the potential delegatee with a context of the tasks. Explain how the task is one small, but important part of a major effort.
- ★ Explain the desired outcome of the tasks being delegated in appropriate terms such as when it is needed and the quality, size, format, location, and documentation.
- ★ Identify the resources that are available to carry out the tasks such as budget, personnel, and available data and information.

- ★ Resist the temptation to overprescribe "how" the delegated tasks are to be carried out. That is, focus on the desired outcome and the resources available to achieve the outcome.
- ★ Depending on what you know about the delegatee, delegate the tasks in such a way that you, he or she, the project, and the organization benefit from the "novice" effect.

- ★ Consider providing milestones to the delegatee.
- ★ Clearly give authority commensurate with what you are asking the delegatee to do.
- ★ Finally, remember that everybody reports to somebody. All delegators are also delegatees.

When you give an assignment to someone and it is understood and committed to, recognize that there are **only three possible outcomes**:

- ★ The work is delivered as needed.
- ★ The work will not be completed as needed, but the delegator is so advised by the delegatee well before the deadline.
- ★ The work is not going to be completed as expected. The delegator learns about the deficiency at or after the time the work was to be completed.

- ★ Expect the first and most desirable outcome to occur most often, but recognize that the second and third outcomes will occasionally occur.

- ★ In reviewing the results of delegated assignments with a delegatee, remember to critique the work, not the person.
- ★ Avoid "you" messages, especially when the work is deficient. Instead, speak about the work, noting which parts satisfy the requirements and which parts are deficient.
- ★ Identify results that are of high quality and those that are of low quality.



- ★ Say "thank you," especially when the work has been carried out in accordance with requirements.
- ★ Consider speaking directly to the person who did the work, calling them, or sending them a handwritten note.
- ★ Through delegation, the young professional demonstrates many important management perspectives and skills, not the least of which is teamwork.

Managing Meetings

- ★ A meeting is defined as three or more people discussing business or professional work.
- ★ Meetings are often a waste of time and excessively frustrating because of poor planning and execution, which often indicates lack of respect for the time, talent, and feelings of others.

- ★ Some meetings are absolutely necessary, because they are the best way to enable groups of people to do certain things. Because so much time is devoted to meetings and because so much important work should be done at meetings, careful meeting management is mandatory.

Reasons to Meet

There are only two legitimate types of meetings:

- ★ The first is a **working meeting** devoted to defining problems, hearing status reports, brainstorming, conceptualizing courses of action, discussing alternatives, and selecting and beginning to implement solutions.
- ★ The principal feature of the working meeting is informed, positive participation by all attendees.

- ★ The second legitimate reason to meet is **to provide a briefing on non routine, crucial matters** such as resignations, promotions, introduction of new staff, acquisition of an organization, and serious financial problems.
- ★ Little discussion is expected.
- ★ The meeting is justified because of the serious implications of the information that is being shared.
- ★ Certain announcements are of major significance and must be fully understood.
- ★ A memorandum or other form of written communication would not be appropriate.

When Not to Call a Meeting

There are more reasons not to call a meeting than to call a meeting:

- ★ You've made up your mind what to do anyway. (Convening others and feigning the seeking of their counsel places your credibility at risk.)

When Not to Call a Meeting

There are more reasons not to call a meeting than to call a meeting:

- ★ You know what should be done, but don't want to take responsibility. (You call a meeting, indicate what should be done, obtain formal approval or informal acquiescence, and then the "blame" can be "spread" if needed.)

- ★ You don't know what should be done and want somebody else to make the decision. (You are responsible, it is your decision, and therefore you should decide.)
- ★ You're trying to use the meeting to "pull a fast one" on a colleague or your boss. (In other words, he or she is out of town and really responsible, but you call a meeting under guise of "an emergency" to make decisions on his or her project.)

- ★ You are on an ego trip and like the sound of your voice.
- ★ The subject is too important to merit a meeting. (quick, decisive action is needed and you clearly have the necessary responsibility and authority.)
- ★ You've lost your case elsewhere and you are looking for a life belt.

Tips for Successful Meetings

1. Reason!

2.

3. Agenda

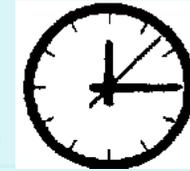


4. Minutes



5.

6. Fixed meeting time if you meet often



7. Otherwise, schedule next meeting at current meeting

8. Adequate facilities

9.



10. All contribute

11. Seek consensus

12. Confidentiality

Tips for Successful Meetings



Tip 1: Meet only when there is a reason.

Permanent committees that meet as a matter of practice tend to encourage the creation of agenda items and unnecessary discussion to fill the time available.

Tips for Successful Meetings

2

Tip 2: Invite only the necessary people.

Those who need to know the results of the meeting, but do not need to participate in the meeting, can be provided copies of the minutes.

Tip 3: Provide a written agenda prior to the meeting.

3

An agenda has the following features:

- ★ All invitees are identified in the "To" portion of the memorandum.
- ★ Both the date and the day of the meeting are indicated.
- ★ The meeting starting time and ending time are shown on the agenda.

Example Agenda

Example Agenda

- ★ The heading "Additional Agenda Items?" appears near the beginning of the agenda.
- ★ This provides the Chair with the opportunity to add topics of discussion and also facilitates input from attendees.
- ★ Individuals having reporting or other responsibilities are identified by name.
- ★ Background, support, and other materials are enclosed.

Example Agenda

- ★ An action-oriented theme is established by using words and expressions such as "select," "follow-up," and "recommended course of action."
- ★ For each agenda item, the invitees are informed via the agenda and the enclosures what the committee is expected or encouraged to do.

Example Agenda

- ★ Consider adding an agenda item, depending on the nature of the meeting, titled "Good News" under which positive happenings are briefly shared. "Bad News" need not be shown on the agenda - it will take care of itself.
- ★ Time spent prior to the meeting by the persons responsible for meeting arrangements, can save considerable time for the entire committee.

Tip 4: Provide a written record.



- ★ Minutes or some other written documentation of the meeting should be distributed soon after the meeting.
- ★ Action items or follow-up tasks agreed to at the meeting should be clearly indicated, accompanied by the names of the people who have agreed to accomplish the tasks.

Tip 4: Provide a written record.



- ★ Arrange for someone to serve as secretary, preferably prior to the meeting, and clearly indicate that the secretary's principal responsibility is to produce accurate minutes in a timely fashion.
- ★ Without the reality check provided by minutes issued shortly after a meeting, each participant will remember, or think, a scenario that should have occurred or would have been nice to experience.

Tip 4: Provide a written record.

4

- ★ Given the opportunity, especially under pressure, individuals tend to rewrite history-to edit the past so as to serve their present and what they hope to be their future.
- ★ You, and those you work with and for, can largely avoid this morass by writing and distributing some form of documentation after every meeting.

Tip 4: Provide a written record.

4

- ★ The minutes serve the long-term function of the group memory and may be all that is needed for most meetings.
- ★ The short-term portion of the group memory is the record of that which has happened at the meeting which is in progress and which participants need to recall during the meeting in order to fully participate.

- ★ An alternative to serve the short-term memory function is to record the key points of the discussion on newsprint, transparencies, or other media readily visible to all participants as the meeting progresses.
- ★ Using this approach, everyone has the same, complete short-term memory, and everyone has an opportunity to question the recorder's interpretation.
- ★ Better to resolve conflicts at the meeting as they occur than after the meeting when formal minutes are produced.

Tip 5: Start and stop on time.

5

- ★ To show respect for the people who have been invited to the meeting, do everything you can to start and stop on time.
- ★ If a meeting is to be the first of a series of meetings of a group, the pattern established at the first or early meetings will tend to prevail.

Tip 5: Start and stop on time.

5

- ★ Consider scheduling meetings late in the morning (e.g., 11:00 A.M.) or late in the afternoon (e.g., 4:00 P.M.) so that impending lunch or dinner encourages focus and brevity.
- ★ Occasionally schedule a meeting very early in the morning prior to the start of normal office hours, during lunch, during dinner, or in the evening to emphasize urgency or provide variety.

Tip 5: Start and stop on time.

5

- ★ Consider setting time limits for each agenda item as a further means of encouraging focus and brevity.
- ★ Some meeting participants may need to attend only a portion of the meeting. Out of consideration for them, the Chair should schedule their appearance at a specific time and excuse them when they are finished.

Tip 6: Establish a fixed meeting time if the group meets often.



- ★ A group that meets frequently should establish a fixed meeting time and then cancel a meeting if it is not needed. This practice enables participants to plan their schedules.

Tip 7: Schedule the next meeting at the current meeting.



- ★ A group that meets occasionally should schedule its next meeting at the current meeting.
- ★ For this, and other reasons that may arise during the meeting, all attendees should bring their time management systems or their calendars to the meeting.

Tip 8: Provide adequate facilities.



- ★ Depending on the nature of the topics discussed and the kinds of presentations to be made, needed facilities, equipment, and supplies may include a blackboard or white board, chalk, flip chart, colored markers, overhead projector, 35-millimeter projector, VCR, refreshments, and access to copy machines, telephone, and rest rooms.

Tip 8: Provide adequate facilities.

8

- ★ Sometimes a very special site may be appropriate such as a retreat setting, a neutral site, or a project location.

Tip 8: Provide adequate facilities.



- ★ All of these things should be anticipated and arranged for ahead of time by the person who is managing the meeting.
- ★ The Chair should arrive early to make sure that everything is in order and arrange to sit in a location where he or she can be easily seen and heard by all participants.
- ★ The Chair should also be within easy view of the door and the clock.

Tip 9: Limit interruptions.



- ★ Make arrangements so that participants are not interrupted by telephone calls, disturbed by walk-ins, or distracted by external noises and activities.

Tip 10: Expect everyone to contribute.

10

- ★ Presumably everybody in attendance has been invited because useful information is being provided and because he or she has something to contribute.

Tip 11: Seek consensus.

11

- ★ While you must recognize that consensus is not always possible, it is a worthy goal.
- ★ Try to focus the group on the mission of the organization and the purpose of the project or other activities being undertaken by the group.

Tip 11: Seek consensus.

11

- ★ Individual ideas adopted and committed to implementation by the group should become group ideas.
- ★ Individuals should detach themselves from their ideas and permit them to be modified as a condition of having their ideas accepted by the group.

Tip 12: Practice confidentiality.

12

- ★ The debate and discussion should, in general, end at the meeting and not be carried on in the hallways and offices by subgroups of meeting participants.
- ★ Participants should recognize that they have an opportunity to make their case at the meeting and should respect the decision of the group.

Dealing with Difficult People and Situations at Meetings

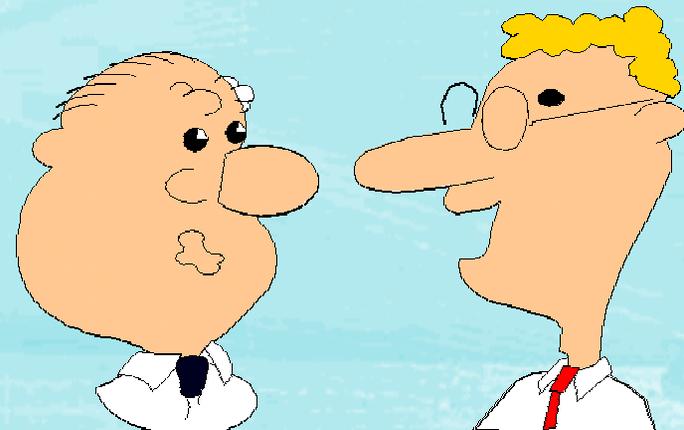
As Chair, you will sometimes encounter intentional or unintentional behavior by members of a committee or by people in attendance at a meeting which, in your opinion, is counterproductive.

Interpersonal problem between you and a committee member

- ★ a problematic behavior involving one person that continues at a given meeting or is repeated at successive meetings may indicate an interpersonal problem between you and that individual.
- ★ Your ability to practice empathetic listening is very valuable in this situation.
- ★ Perhaps you and the other individual should privately discuss the matter outside of the meeting environment.

Committee member speaks to one or more individuals out-of-turn in a low, negative, and insulting tone.

- ★ The Chair could, during the meeting, abruptly ask the person to repeat and explain his or her comment for the benefit of the entire committee.
- ★ Then invite questions and comments from the committee members to reinforce the idea that participants are to speak to the entire group and show courtesy when others are speaking.



- ★ Another approach is for the Chair and everyone else to simply stop talking and draw attention to and listen intently to the side conversation.
- ★ The resulting embarrassment may stifle the negative activity.

Committee member continues to press for course of action even though the committee, by consensus or formal vote, is clearly opposed.

The Chair could ask that person to put his or her ideas or arguments in writing for possible future reconsideration or for the record.

Committee member talks too much.

Some meeting participants simply talk too much relative to the point they are trying to make or the information being offered and also relative to the speaking time available for other committee members.



One of the solutions is for the Chair to make comments such as:

- ★ "Henry, I think you've made your point-let's permit others to make theirs."
- ★ "Heidi, I think we must move on-our agenda is full."
- ★ "Hans, that is interesting, but I think you are moving away from our agenda."

A person does not contribute.

- ★ This behavior is most likely to occur early in the "life" of a new committee or working group or when a person joins an existing committee or working group.
- ★ Unlike the preceding four situations, this behavior is not disruptive.
- ★ Nevertheless, presume that every person has a reason for being at the meeting and has a right and obligation to contribute.

A possible solution is to, in a very gentle way and at the right moment,

say something like:

- ★ “Nancy, I understand that you have some experience in this area. What is your opinion?”
- ★ “John, we haven't heard yet from the planning department; what are your concerns?”

Individual is opposed to everything.

- ★ Some individuals are often opposed to new concepts, ideas, and proposals.
- ★ A person of this persuasion typically takes the position that a suggested new approach will not work or says something like "We tried that ten years ago and it failed."
- ★ One approach is to determine if the person thinks there is a problem.

For example, say:

- ★ "Emily, do you think we have a problem to be solved?"
- ★ If the answer is "yes," then ask her to offer a solution at this or the next meeting.
- ★ If she chooses the latter, indicate that her report will be an agenda item.

In summary, if an individual recognizes a problem and takes the position that the solution suggested by others is unworkable, he or she has an obligation to present a feasible solution.

The "know what we should do?" person.

- ★ Occasionally a committee will include a person who precedes a lot of statements with "You know what we should do?" but does not commit to take action or assume responsibility.
- ★ In this situation, the Chair should, during the meeting, ask the "idea" person to research one of his or her ideas and present a written or an oral report on it at the next meeting.

Miscellaneous Thoughts

- ★ If a manager calls a meeting to "discuss" a topic, the manager gives up the option to act unilaterally on that topic or area.
- ★ To do otherwise is to risk loss of credibility.

Miscellaneous Thoughts

- ★ Carefully selected handouts, visual aids, and props can be very effective at meetings.

For example, assume that you are trying to convince the group that they should utilize a new material in a product being manufactured by your organization.

Bring a sample or samples of the material to the meeting so that everybody can see and feel it as you talk about it.

Miscellaneous Thoughts

- ★ Planned and unplanned supervisor-supervisee interactions and discussions with colleagues constitute special kinds of meetings, certainly informal ones.

While such "meetings" usually do not follow a formal agenda that is provided ahead of time, try to bring a list of discussion items to the discussion and indicate to the other person that there are specific topics you would like to discuss.

Miscellaneous Thoughts

- ★ These informal meetings often lead to various kinds of follow-ups.
- ★ Rather than a single document, such as a set of minutes, the follow-up might be in the form of documents that are related to topics discussed and decisions made at the meeting with your supervisor or supervisee.
- ★ An example would be a memorandum to a third party with a copy to the person with whom you met.

Appreciating And Working With Support Personnel

Appreciating And Working With Support Personnel

Support personnel include secretaries, clerical workers, word processing staff, technicians, draftpersons, surveyors, and data entry personnel.

Major Differences between Support Personnel and the professional staff

- ★ Most of the work done by support personnel is at the specific request of the professional staff (e.g., engineers, planners, economists).
- ★ They do not usually unilaterally initiate projects or major tasks or take on portions of projects as do the professional staff.

- ★ Support personnel tend to be more specialized.

That is, a support person performs a narrower range of functions than the professional person and typically executes them with a high level of skill and expertise.

★ The areas of expertise within the support personnel tend to be different than the areas of expertise within the professional staff.

Thus, support personnel as a group are highly skilled in critical areas such as word processing, particular types of graphics, data entry, surveying, testing, and uses of specialized equipment such as computer-aided drafting workstations and thermal imaging devices.

Essential Members of the Organization

- ★ The entry-level engineer is advised to view the support staff as valuable members of the organization because of their special skills and their lower labor cost.
- ★ One or more support personnel should be brought in for a project whenever and wherever their combination of expertise and cost per unit of production is more favorable than having the tasks performed by professionals.

Essential Members of the Organization

- ★ Even if the entry-level person has the necessary skills, the cost per unit of production should govern.

- ★ Just because the entry-level engineer could do a task does not mean he or she should do the task.
- ★ The young technical professional should recognize that he needs a support staff more than they need the young professional.
- ★ That is, in well-managed engineering organizations, if some of the support staff are not assisting a particular technical professional with his or her project, they will be engaged with another project.

Challenges Unique to Working with Support Personnel:

1. Communication.
2. Age differential.
3. Devaluation

1. Communication.

- ★ One challenge is communication - mainly writing, speaking, and listening-between the young technical professional and the support staff.
- ★ Professionals in highly technical and sophisticated disciplines routinely communicate with each other using terms, concepts, acronyms, abbreviations, and other expressions known only to them.

1. Communication.

- ★ The support staff, because of their narrower and more pragmatic or applied training and interests, will not be as widely conversant.
- ★ There is a communication challenge for the entry level technical professional if he is to be productive, that is, to effectively work with the people and use the resources available in the organization.

2. Age differential.

- ★ Most of the support staff will be older than the entry-level technical professional.
- ★ Inherent in the age differentials will be a wealth of knowledge in areas such as "how this place really runs" or where you can find or get something.
- ★ The entry-level engineer should conduct himself so as to benefit from that knowledge.

- ★ One indication that the confidence and respect of support personnel is being earned is when they make comments to the young person such as "I'm sure you know how you want this done, but if I were you I would consider doing it this way..."

3. Devaluation.

- ★ There is an unfortunate tendency among some engineers to look down on or devalue support personnel.
- ★ As the entry-level professional surveys an organization, particularly the larger, diverse public or private entity, he is likely to see people in a variety of positions, some of which appear undesirable.

3. Devaluation.

★ **For example,** from the perspective of the recent college graduate, some jobs may be characterized as simple, boring, dirty, noisy, and hot. Because the entry-level professional would not want to do those jobs, he or she looks down on those who do.

- ★ This devaluing perspective may be evident in the young professional's relationships with the support staff.
- ★ **One example,** is the use of first names without being specifically invited to do so.
- ★ **Another example,** is being impolite to and surly with support staff, but polite to and friendly with the professional staff.
- ★ The overall impact is very negative.

- ★ It is presumptuous and arrogant to assume that a person's inherent value is determined by the position he holds on an organization chart.
- ★ The economic value of people's work varies widely, reflecting their education, experience, and responsibility, their inherent value as individuals is an independent matter.

- ★ The young doctor is strongly advised to take the position, unless he or she knows otherwise, that everyone in the organization is doing basically what they want to do.
- ★ Assume that each person has consciously made a series of education and work decisions that led to their current position.
- ★ People should not be embarrassed by or have to apologize for the position they hold or the work they do, unless the work does not meet the expected quality and quantity for the position.

Managing Your Boss

- ★ It is the process of consciously working with your superior to obtain the best possible results for you, your boss and the company.
- ★ You are encouraged to have high expectations for both you and your immediate supervisor while remembering that you and he or she are in a situation of "mutual dependence between two fallible human beings". In other words, you need each other, and neither of you is perfect.

Understand your Boss

Make sure you understand your boss and his or her context, including:

- ★ Goals and objectives
- ★ Pressures
- ★ Strengths, weaknesses, blind spots
- ★ Preferred work style

Assess yourself

Assess yourself and your needs, including:

- ★ Strengths and weaknesses
- ★ Personal style
- ★ Predisposition toward dependence on authority figures

Develop a Relationship

Develop and maintain a relationship that:

- ★ Fits both your needs and styles
- ★ Is characterized by mutual expectations
- ★ Keeps your boss informed
- ★ Is based on dependability and honesty
- ★ Selectively uses your boss's time and resources.

CARING ISN'T CODDLING

- ★ As you begin to manage your relationships with others, optimally an element of caring will be evident in your actions towards others and in the actions of others towards you.
- ★ Caring does not mean coddling.
- ★ Caring is pushing, pulling, admonishing, stretching, demanding, encouraging, urging, challenging, cajoling...

- ★ Caring is high expectations coupled with high support.
- ★ Caring helps individuals and organizations meet their goals and realize their full potentials.

Second Workshop



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Creativity and Innovation

Workshop 2

January 2004

Creativity & Innovation

- Introduction
- Characteristics of the Creative Person
- Creative Process
- Personal Barriers to Creativity
- Management Barriers to Creativity
- Discussion Questions
- Case Study

Creativity & Innovation

Introduction

Creativity is basically the ability to produce new, interesting, and useful results. It is the production and disclosure of a new fact, law, relationship, device, product, material, or process that is based generally on known and available knowledge but does not follow directly, easily, simply or even by usual logical processes from the information at hand.



Creativity & Innovation

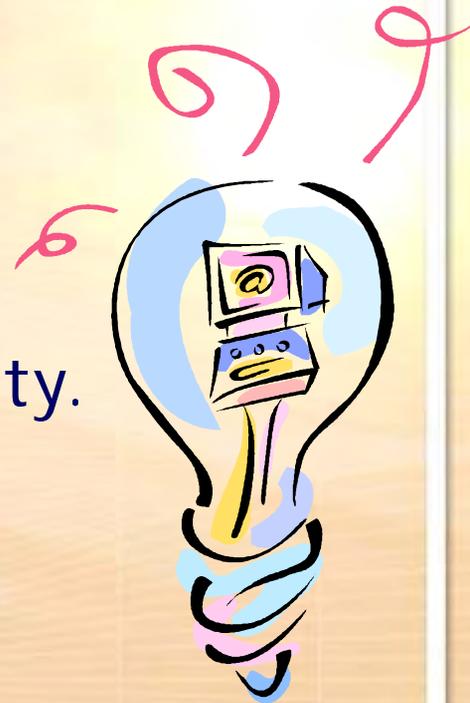
Characteristics of a Creative Person

1. High degree of autonomy , self sufficiency , and self direction.
2. Inner drive for knowledge that must be continually satisfied.
3. Knowledge and acquaintance with a broad range of different subject matters.
4. Great curiosity about how or why things work.

Creativity & Innovation

Characteristics of a Creative Person

5. Good observer.
6. Preference for mental manipulations involving things, not people.
7. High ego strength and emotional stability.
8. Liking for method , precession, and exactness.
9. Liking for abstract thinking.
10. Broad interest in intellectual activities and games.



Creativity & Innovation

Characteristics of a Creative Person

11. Marked independence of judgment and rejection of group pressures for conformity.
12. Marked disregard for rules and regulations if their purpose is not clear.
13. Liking for pity oneself against uncertainty where one's own effort can be a deciding factor.
14. Capability for intense concentration on a subject of interest to the exclusion of all other matters.



Creativity & Innovation

Characteristics of a Creative Person

15. Ability to generate large numbers of ideas, most of which are impractical.
16. Keen sense of humor and often a lover of practical jokes.
17. Many, if not most. Love and participate in arts by playing the piano, violin, or some other instrument and writing poetry or fiction.
18. Intuitive and imaginative.
19. Has drive and is very busy.

Creativity & Innovation

Characteristics of a Creative Person

- Superior general intelligence, some evidence that they tend to place either in the top or bottom deciles of their class in school.
- Small number of close friends; they are not joiners of organizations other than technical ones.
- Can face ambiguous situations easily.
- Largely self-satisfied and not very self-critical.

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To illustrate the importance of these traits of individualism and their relationship to freedom of action, this quotation is given from an extremely successful medical investigator and administrator at Harvard University:

Creativity & Innovation

“ One of the most striking characteristics of an expert is his strong individualism. He has his own personal curiosities, his own plans for work, and his own ways and methods for carrying out his plans. It is difficult for him to engage with other experts as a member of a team. New ideas for research come to mind in the course of his investigations that enticingly lead him away to fresh fields for discovery. He wishes to follow the prospects thus not because he fails to respect or appreciate highly what others are doing but because he is satisfying an eager personal interest. What proves attractive to him, furthermore, may not prove attractive to others. Indeed, it may be difficult for him to justify to others the course he intends to pursue”.

Creativity & Innovation

Creative Process

Step 1. Irritation and Decision

Creativity is triggered when one is confronted with something irritating or disturbing in a situation and decides to do something about it. The creative person characteristically pays attention to troublesome details that the ordinary minds discard as irritating trivia. Curiosity and a desire to understand coupled with the conviction that an answer can be found, separates the creative from the uncreative. Necessity may be the mother of invention, but action is its father.



Creativity & Innovation

Creative Process

Step 2. Preparation

The preparation stage is a period of conscious, direct, mental effort devoted to the accumulation of the information pertinent to the problem. This vital second step requires mental discipline of the highest order. Quite often the problem is solved at this stage as one submerges oneself in the problem while trying to:

- A- structure the problem.
- B- Collect all available information.
- C- Understand relations and effects.
- D- Solve sub-problems.
- E- Explore all possible situations that may lead to a satisfactory solution.



Creativity & Innovation

Creative Process

Step 3. Frustration and Incubation

If the problem is not solved at step two, frustration leads to a decision to discard the task and go to another assignment. A period of complete or relative inactivity follows, with perhaps a recurrence of ideas or thoughts about the problem, but with no evident progress toward a solution. However, the subconscious mind, now fully prepared to all kinds of information from step 2, continues to work on the problem. During this stage the problem is allowed to ferment, to cook, to incubate over a period of time as the subconscious tries different combinations of the facts and experience fed to it.



Creativity & Innovation

Creative Process

Step 4. Illumination

It involves sudden inspiration, which consists of spontaneous insight into a possible solution. The creative idea or unique solution occurs in a flash, usually during a period of rest or while engaged in an activity completely foreign to the problem. Some experts believe that the subconscious mind works harder in probing for ideas when conscious mind is at rest, such as during sleep or relaxation. Dreaming a solution is not unusual ; many creative people keep a pencil and pad at their bedsides and carry them at all times.



Creativity & Innovation

Creative Process

Step 5. Verification

Illumination has occurred and the creative idea is at hand. The idea must now be checked and tested to see if it indeed provides a solution. Not every hunch is sound. Intuition can be wrong and a flash of insight defective. Sound judgment requires solid evidence to prove whether an idea is actually worthwhile, so we must go through a program of critical analysis, testing and evaluation. If the idea turns out not to be a solution of a problem, we usually return to step 2 and another period of intensive effort to find a solution.



Creativity & Innovation

Personal Barrier to Creativity

Functional Fixedness:

Familiarity with certain objects or concepts within a fixed usage context prevents us from seeing the possibility of other uses.

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Personal Barrier to Creativity

Habit Transfer:

Past conditioning and fixed method of thought cause us to approach problems in the same old ways. All professionals have been trained in a certain specific method of analytical, evaluative and deductive thinking. By the time they have finished college they have learned the customary or correct solution or approach to problems without considering other, perhaps more creative, approaches.

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Personal Barrier to Creativity

Dependency on Authority

Closely allied to the barrier of habit transfer is the problem of over dependence on authority. Often professionals are so impressed by the judgment and approaches of recognized experts and authorities that they immediately accept them as a whole truth.

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Personal Barrier to Creativity

Premature judgment

Many people pride themselves on being pragmatic and practical. These individuals insist that we get down to the facts immediately and not roam imaginatively around the problem.

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Personal Barrier to Creativity

Overspecialization

Professionals are trained in one profession and each one has specialized talents that he or she relies on to solve problems. Most professional people have their own way of viewing the world and attempt to relate problems to this view.

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Personal Barrier to Creativity

Fear of failure

Most of us have been raised to consider failure as something very shameful.

Fear of Ridicule

As we have seen, creativity is exhibited by the individual who is free from a way of thinking that is held by friends and associates who may be more intelligent, better educated, and better disciplined, but who have not mastered the art of the fresh, clean look at the old knowledge and ways of doing things.

Creativity & Innovation

Reluctance of Managers to take Chances

No manager should accept an idea just because it is new and innovative. On the other hand, there is no such thing as a risk-proof change. The manager should recognize that merely keeping the status quo entails a risk.

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Management Barriers to Creativity

1. Tendency of Management to tell the Technician professionals what and how to do.



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Management Barriers to Creativity

2. Rigid Lines Of Authority:



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Management Barriers to Creativity

3. Lack of Long range objectives:



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Management Barriers to Creativity

4. Frequent changes of key decisions:



Creativity & Innovation

Management Barriers to Creativity

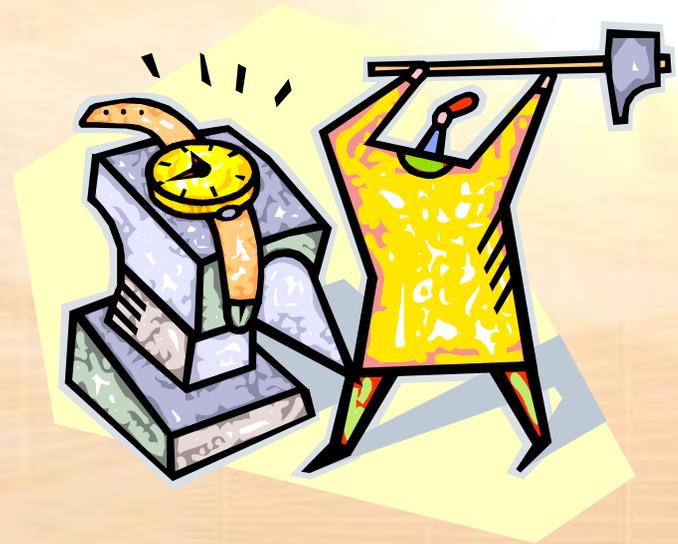
5. Lack of effective communication between management and professional staff:



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Management Barriers to Creativity

6. Management emphasis on immediate utility of ideas:



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Management Barriers to Creativity

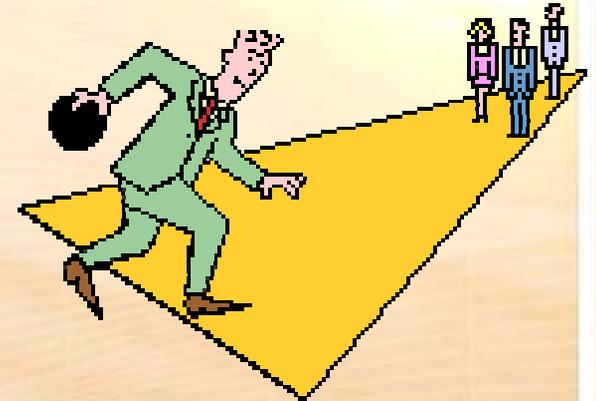
7. Failure of management to recognize and reward creative ability:



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Management Barriers to Creativity

8. Poor handling or outright misappropriation of credit for new ideas :



Creativity & Innovation

Discussion Questions

- Should highly creative people be treated differently (special privileges, such as being exempt from certain rules and regulations) than their less creative colleagues?

Creativity & Innovation

Discussion Questions

- Should competition or cooperation be encouraged to increase creative output?
- Should informal communication channels be encouraged to increase creative output?

Creativity & Innovation

Discussion Questions

- Is planning detrimental to creativity?
- Can individual initiative and creativity survive in large medical organizations?
What positive steps can be taken?

Creativity & Innovation

Discussion Questions

- **Would it be desirable for a technical group to be composed entirely of strongly motivated , self starting go-getters who were highly creative?**

Creativity & Innovation

Case Study:

Dr. Ahmed, head of the research and development department in a medical research center, was deep in thought when Dr. Khaled appeared at the door.

Dr. Khaled was one of the senior medical researchers who had been with him for 15 years. Ten years ago they had done some of the pioneering work on birth control medical research, which had thrust the research center into the forefront of Egyptian research centers.

Creativity & Innovation

Case Study:

Dr. Ahmed had just returned from the president meeting where he had been confronted with the lack of innovation of his group.

The president had been distressed by the fact that the last five new research papers presented to the board of directors were all obviously imitations of other research centers research papers.

" this Medical Research Center has always been a leader, not a follower" the president had said, "when are we going to begin to see some innovation of our group?"

Creativity & Innovation

Khaled: Ahmed, I have got a real problem with Dr. Said Taha. He's only been here 3 months and already I am having problems with him. I can't get him to do anything. All he wants to do is work on that new birth control technique which is still under development .

Ahmed: I thought that was what you wanted him to do.

Khaled: It is, but there are other things that have to get done. I can't even get him to write his weekly progress reports. He pays no attention to prescribed procedures and doesn't even read the policy statements i put out.

Ahmed: What does he say when you ask him about these things?.

Khaled : Oh, he is always very apologetic and promises to get right on it as soon as he is finished from his experiments, but nothing happens and when I check him I find him at the lab.

Creativity & Innovation

Ahmed: May be you just haven't gotten across to him the importance of these administrative matters. He certainly is bright enough and seems to do an excellent technical job.

Khaled : He understands well enough. He is just too self indulgent and concerned only with enjoying himself doing what he wants to do. Besides he shows no intention to help in administrative responsibilities.

Ahmed : Khaled, don't you remember when we used to bridle and scream about all the paper works?

Khaled : Sure, but you and I made the sacrifice in order to help create and make this research center grow!.

Ahmed : Khaled, what do you want me to do?

Khaled : Well , may be if you talked to him ...

Creativity & Innovation

A few days later, Ahmed walked down the hall to Said Taha's office.

Said: Oh, hi Dr. Ahmed, I didn't see you come in. What can I do for you?

Ahmed: I just thought I'd drop in and see how you were coming with your research.

Said: It's coming great, I am really excited about the possibilities. Do you realize the impact this research will have if we can make it possible to use.

Ahmed: You look tired, Said, are you feeling all right?

Said: Oh, I am feeling great. I am a little tired because I have been working until late at night at home reading on this thing. I get so involved, I even forget meetings sometimes. Poor Dr. Khaled is getting kind of angry with me, I am afraid. I am a little late with a couple of reports he wants. He just doesn't understand how important it is to come up with this device into the light.

Creativity & Innovation

Ahmed: Well, you know, Said, Dr. Khaled has his problems, too. People are putting the pressure on him to get the paper work out.

Said: Yeah I know that and I really feel guilty sometimes. But I have given him verbal reports, written one's can wait, would you like to see some of the research results? It's really great.....!!!!!!!

In the next day, Dr. Ahmed called for a meeting in his office with Khaled and the other two senior Researchers on his staff, Ameen Tharwat and Sherif Ryad

Ahmed: The reason I have called this meeting is to see what we can do to increase creativity and innovation around here. The only new ideas I, and the president, now see are those from the new people, like Said Taha. You three have been here a long time. What's wrong? What can we do to get back to the top of things?

Ameen: Well I don't necessarily agree that what we are doing is trivial, but perhaps if we had each technical person prepare a new 5 years plan, some new ideas might immerge.

Creativity & Innovation

Sherif: Another thing we could do is to have a weekly seminar at which senior researchers could give a report on what they are doing.

Khaled: I think the real problem is public relations. Perhaps we should inform the president and the board the importance of the projects we are pursuing.

Ameen: Another part of the problem is a lack of manpower and equipment. If we had more people and better facilities, there are a lot of things we can do.

After another hour of similar discussion, Ahmed brought the meeting to an end with the request that the three researchers put their ideas into writing and submit them to him by the next Saturday.

Creativity & Innovation

Case study discussion questions:

- Can you identify some of the attitudes, procedures, etc., that might be inhibiting creativity?
- Should Said Taha be reprimanded or perhaps even fired?
- What specific ideas could you suggest to Dr. Ahmed to improve creativity?
- Does Dr. Ahmed understand his problem?



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Working in Groups

Workshop 2

January 2004

Interaction in Teams and Groups

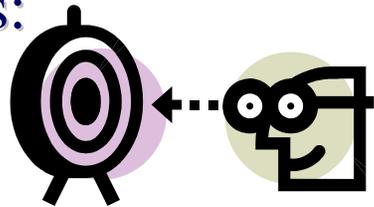
- Introduction
- Group Development
 - Forming
 - Storming
 - Norming
 - Performing
- Dynamics in Groups
- Creative Conflict
- Group Decision Making
- Team Work

Interaction in Teams and Groups

Introduction

Three key dimensions that help us understand different type of groups:

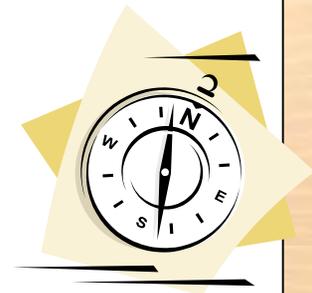
■ Purpose



■ Structure



■ Time



Interaction in Teams and Groups

Group Development

Forming

Forming is the group's initial stage of coming together and refers to tasks as member recruitment and affiliation.

- What information do people need?
- When will the group meet?
- How will the group communicate?
- What will the type of commitment mean?
- What are the purposes and mission of the group?
- What agreement is needed to make this group functional?

Interaction in Teams and Groups

Group Development

Storming

- Storming is the stage when the group starts to get in gear and differences of opinion begin to emerge.
- If the group is not clear about its purposes and goals, or if the group cannot agree on shared goals then it might collapse at this stage.



Interaction in Teams and Groups

Norming

- Norming follows storming.
- Once the group resolves key differences it establishes patterns of how it gets work done.
- The group sets up formal or informal procedures for which things come to the whole group, which reports are needed, who is involved in what, and how people interact.

Interaction in Teams and Groups

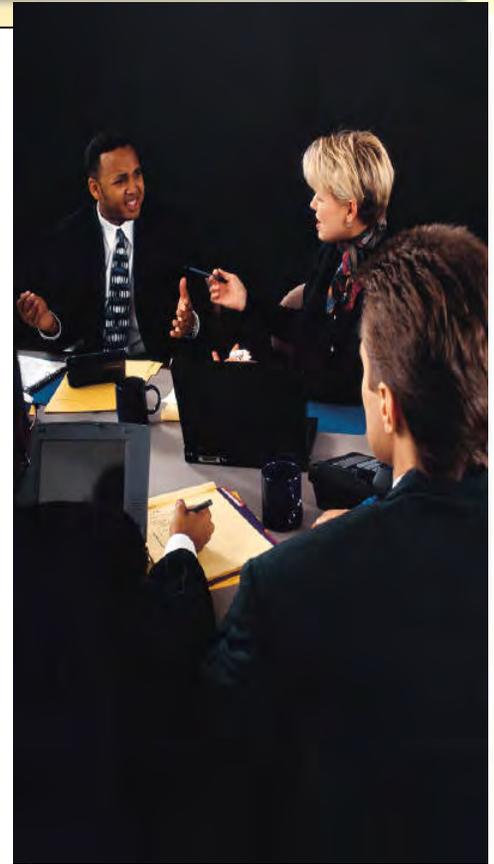
Norming

- At this stage individuals in the group deal with both intimacy and identity. Members of the group began to understand the group's culture.
- The group practices that evolve in the norming stage are often more obvious to outsiders than to those in the group. These practices and characteristics might also describe the personality of the group.

Interaction in Teams and Groups

Performing

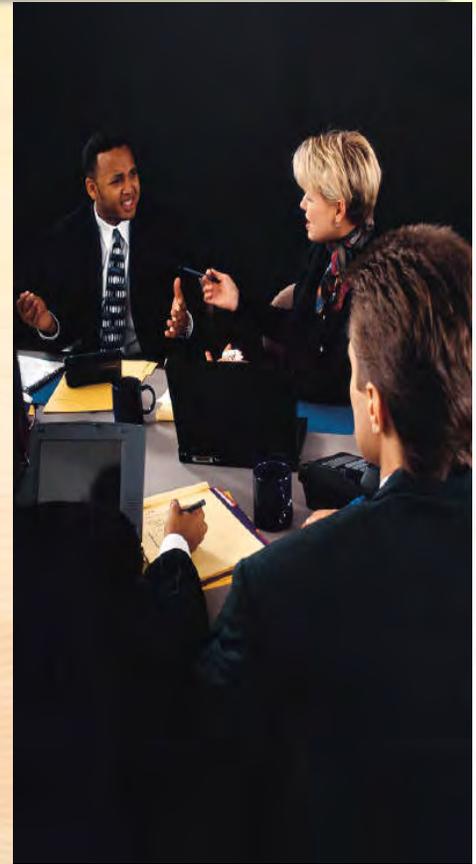
- Performing Is the fourth stage of group development. It is built on the foundation of the previous three stages.
- Time limited groups may need to quickly get to the performing stage to get their work done in a timely way.
- The group now cycles in a mature “stage of equilibrium”.



Interaction in Teams and Groups

Performing

- They need to intentionally and effectively work through the previous stages and not skip right to performing without the foundation process.
- On-going groups with long time durations will have to stay renewed and continually recycle to be effective.
- Otherwise, they risk becoming dysfunctional or even terminating.



Interaction in Teams and Groups

Performing

- Even the most successful groups have to revisit this cycle when new members join (forming)., when new issues challenge the group's purpose (storming) , or when new processes are needed because old ones no longer work (norming).
- Groups exist over different time frames. All—short-term groups like task forces and special topic committees need to plan on their eventual termination. Groups that intend to exist for a long time, often with no planned end insight, need to stay vibrant and healthy if they are to continue effectively.

Interaction in Teams and Groups

Performing

- Groups that do not engage in continual re-visiting of the cycle to stay active and vital may find themselves moving toward a final stage of group development-
Dissolution.
- If groups doesn't maintain new members or keep up with current issues and needs, it may find itself unable to perform.

Interaction in Teams and Groups

<i>When the group is ...</i>	<i>Relational leadership philosophy would encourage participants to ...</i>
Forming	<ul style="list-style-type: none">-Be inclusive & empowering -Make sure all shareholders are involved-Seek diverse members to bring talent-Model the processes of inclusion and shared leadership-Identify common purposes and targets of change-Creates climate where each person matters – Group commitment
Storming	<ul style="list-style-type: none">-Be ethical and open - Gives divergent views full hearing-Aware at bias or block of full participation of another-Handle conflict directly and openly encourages participants to identify their biases-Revisit purposes of the group and targets of change

Interaction in Teams and Groups

<i>When the group is ...</i>	<i>Relational leadership philosophy would encourage participants to ...</i>
Norming	<ul style="list-style-type: none">-Be fair with processes - Practice collaboration- keep new members welcomed, informed and involved-Clarify individual's responsibility to expectations of group & vice versa
Performing	<ul style="list-style-type: none">-Celebrates accomplishments & find renewal in relationships-Empower members to learn new skills & share roles in new ways-Revisit purposes and rebuild commitment

Dynamics in Groups



Interaction in Teams and Groups

Dynamics in Groups

Task Role	Role Description	Example of role in use
Information seeker	Aware that the group needs more facts or data before proceeding	<i>“We can’t vote yet on this, we need more information first. So let’s ask Sharon to brief us at the next meeting.”</i>
Opinion seeker	Aware that the group needs more insight, ideas or opinions before proceeding	<i>“What do you think Roger? You had a lot of experience with this topic.”</i>
Opinion giver	Sharing one’s views, feelings or ideas so the group has the benefit of your thinking	<i>“I strongly think we must increase the budget for this project if we intend to serve more students.”</i>

Interaction in Teams and Groups

Dynamics in Groups

Task Role	Role Description	Example of role in use
Summarizes	Considering the nature of ‘the opinions’ or discussion in a capsule format for clarity	<i>“Before we go further, is it accurate to say that while some of us think we shouldn’t spend much money, we all agree we should do this project?”</i>
Clarifier	Elaborating or explaining ideas in new words to add meaning. Showing how something may work if adopted	<i>“Jim, did you mean we need more involvement meaning quantify or better involvement like quality?”</i>
Gatekeeper	Inviting those who haven’t yet spoken or have been trying to say something into the conversation	<i>“Tanya has been trying to say something on this for a while. I’d like to hear what that is.”</i>

Interaction in Teams and Groups

Dynamics in Groups

Task Role	Role Description	Example of role in use
Encourager	Welcoming all individuals & diverse ideas. A warm response to promote the inclusion & empowerment of others	<i>“What the new members just said about this issue was really enlightening. I am really glad some risks to tell us that. Thanks.”</i>
Mediator	Someone who harmonizes conflict and seeks to straighten out opposing points of view in a clear way	<i>“You two don’t seem as far apart in this issue as it might seem. You both value the same thing & have points of agreement.”</i>
Follower	An active listener who willingly supports the group’s actions & decisions	<i>“I haven’t said much, but this has been a great discussion and I really feel informed. I am comfortable with this decision.”</i>

Creative Conflict



Interaction in Teams and Groups

Creative Conflict

- The storming stage of group development can paralyze a group's progress.
- Unresolved conflict at any stage can create a group climate that is tense and hostile, or it can be an effective method for improving the group's outcomes.
- What words or emotions come to mind when you think of the term conflict? For most people, the idea of conflict is uncomfortable and creates knots in their stomachs; most of us would prefer harmony.

Interaction in Teams and Groups

Creative Conflict

- Role conflicts are best handled by thinking of what assumptions you might be bringing to the conflict about your own role or expectations of others that clash with their assumptions.
- It is not uncommon for people to want to avoid conflict, so they often ignore to pretend it doesn't exist. Some say it is like having an elephant in the room.
- Every one is aware of the tension that a huge conflict creates, but no one talks about it.
- Still others diffuse conflict by acting as if it is unimportant or can be handled at another time. True communities resolve conflicts rather than avoiding them. It is usually best to employ negotiation and mediation strategies instead of power strategies.

Interaction in Teams and Groups

Creative Conflict

- Conflict might result from such things as clashes in personalities, expectations of roles (role conflict), or conflict over ideas. Personality conflicts can often be understood by returning to personality preferences and learning preferences.
- The resulting different conflict resolution outcomes have been described as win-win, win-lose, and lose-lose.

Interaction in Teams and Groups

Creative Conflict

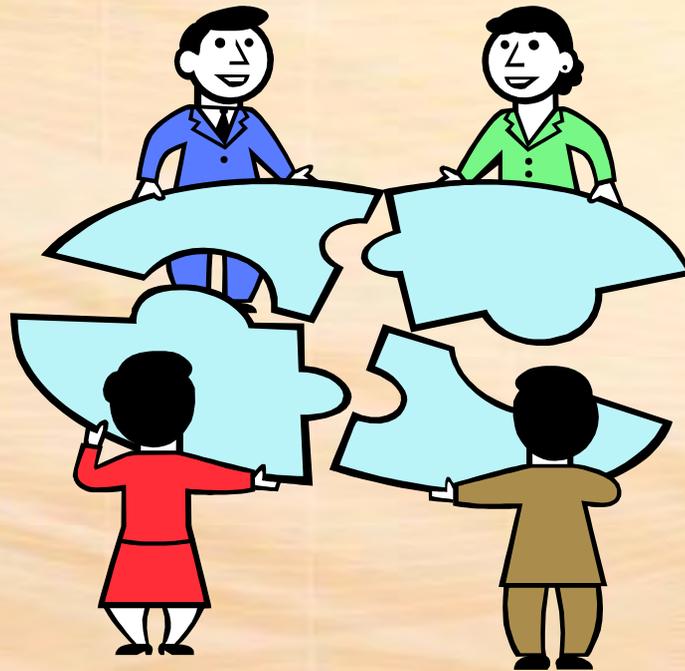
- In win-win outcomes, both sides are heard and are satisfied with the resolution of their differences. The decisions made may significantly be better than they would have been without the dialogue.
- In win-lose outcomes, one side uses power strategies to win by outtalking, putting down, or rushing to premature vote. But in the process, a loser is created. The participants who lost feel marginalized , angry and even resentful.
- In lose-lose outcomes, other side use power strategies and get so entrenched, rigid,or hurtful that no effective resolution is reached, even in compromise.

Interaction in Teams and Groups

Creative Conflict

Advantages of Conflict	Liabilities of Conflict
<ol style="list-style-type: none">1. Can increase motivation and energy.2. Clarifies issues and positions3. Can build internal cohesiveness and esprit de corps.4. Can lead to innovation and creativity5. Can increase self-awareness6. May be a means of dealing with internal conflicts7. Can lead to new synthesis of ideas or methods.	<ol style="list-style-type: none">1. Can be debilitating2. Can distract from goal achievement3. Can cause defensiveness and rigidity.4. Can cause distortions of reality5. Often becomes a negatively reinforcing cycle6. Tends to escalate and proliferate7. Efforts to resolve are often not reciprocated.

Group Decision Making



Interaction in Teams and Groups

Group Decision Making

Methods of decision making	Disadvantages	Advantages
<p><i>Decision with authority without discussion</i></p>	<ul style="list-style-type: none"> -One person is not good resource for every decision -Group interaction is lost -No commitment to decision implementation is developed -Resentment & disagreement may result in deterioration of group effectiveness -Resources of other members are not used 	<ul style="list-style-type: none"> -Applies more to administrative needs -Useful for simple routine decisions -Should be used at lack of time, when group members expect decision from leader, and when members lack the skills & information to make the decision any other way

Interaction in Teams and Groups

Group Decision Making

Methods of decision making	Disadvantages	Advantages
<i>Expert member</i>	<ul style="list-style-type: none"> -Difficult to determine who the expert is -No commitment to implement the decision is built -Advantages of group interaction is lost -Resentment & disagreement may result in deterioration of group effectiveness -Resources of other members are not used 	<ul style="list-style-type: none"> -Useful when expertise of one person is so far superior to all other group members that little is to be gained by discussion -Should be used when need for membership action in implementing the decision is slight

Interaction in Teams and Groups

Group Decision Making

Methods of decision making	Disadvantages	Advantages
<i>Average members opinion</i>	<ul style="list-style-type: none">-Not enough interaction between members to gain benefits of discussion-No commitment to implement the decision is built-Unresolved conflict and controversy may damage group effectiveness in the future	<ul style="list-style-type: none">-Useful when time for group discussions are limited (urgent)-When members commitment isn't necessary for implementing decision and when members lack the skills and information to make the decision-Applicable to simple routine decisions

Interaction in Teams and Groups

Group Decision Making

Methods of decision making	Disadvantages	Advantages
<i>Decision by authority after discussion</i>	<p>No commitment to implement the decision is built</p> <ul style="list-style-type: none">-Unresolved conflict and controversy among members-Tends to create situations in which members either compete to impress designated leader or tell the leader what they think he/she wants to hear	<ul style="list-style-type: none">-Uses the resources of members more than previous methods-Gains some of the benefits of group discussions

Interaction in Teams and Groups

Group Decision Making

Methods of decision making	Disadvantages	Advantages
<i>Majority control</i>	<ul style="list-style-type: none">- Usually leaves an alienated minority which damages future group effectiveness- Relevant resources of many group members may be lost- Absence of full commitment to implement the decision- Full benefit of group interaction is not obtained	<ul style="list-style-type: none">- Can be used when sufficient time is lacking for decision by consensus or not important decision & no need for member commitment in implementing decision- Closes discussion on issues not highly important for the group

Teamwork



Interaction in Teams and Groups

Working Groups	Teams
<ul style="list-style-type: none">■ A strong clearly focused leader is appointed■ The general organizational mission is the group's purpose■ Individual work provides the only products■ Effectiveness is measured indirectly by group's influence on others■ Individual accountability only is evident■ Individual accomplishments are recognized and regarded■ Meetings are efficiently run and last for short periods of time■ In meetings members discuss, decide, and delegate.	<ul style="list-style-type: none">■ Shared leadership responsibilities exist among members■ A specific, well defined purpose that is unique to the team.■ Team and individual work develop products■ Effectiveness is measured directly by assessing teamwork products■ Both team and individual accountability are evident■ Team celebration■ Meetings with open-ended discussion and include active problem solving.■ In meetings members discuss, decide, and do real work together.



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Motivation

Workshop 2

January 2004

Motivation

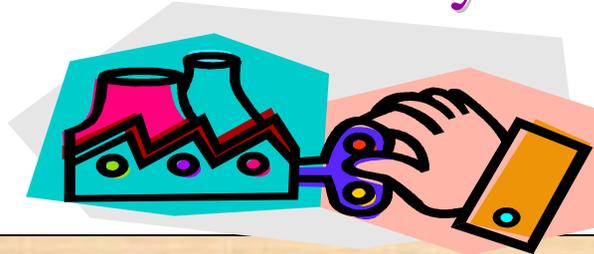
- Introduction
- Maslow - Herzberg
- Job environment Versus Content
- Motivation in a Stable Organization
- Effects of Aging
- Discussion Questions
- Case Studies

Motivation

Introduction

The question of what makes human beings work productively is a question of obvious and fundamental importance to any manager. The answer to the problem of what manager can do to increase the performance of his employees is vastly complex and only vaguely understood. We can state the problem in the following formula:

Performance = Goals x Ability x Motivation



Motivation

Introduction

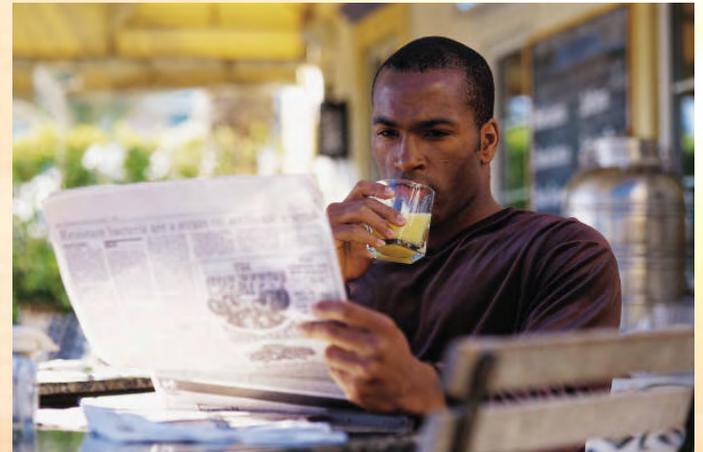
In other words, performance results from knowing what to do, how to do it, and , at the same time, having a reason or motive for doing it. There is only one way to get people to do what you would like them to do, and that is by making them want to do it.

Motivation is:

*THE INTERNAL SOURCE OF ENERGY THAT TENDS TO
ACTIVATE THE BEHAVIOUR OF INDIVIDUAL.
BECAUSE IT IS INTERNAL TO THE INDIVIDUAL,
MOTIVATION CANNOT BE OBSERVED OR MEASURED
DIRECTLY.*

Maslow

1. *Physiological* needs are the basic factors that maintain life. e.g food, air ,shelter..etc. These needs must be fulfilled before the individual can consider other factors. Maslow suggested that people are only partially fulfilled at one level before their needs at the next level begin to emerge.



2. *Safety* needs take over after the physiological needs are basically or or minimally satisfied. Safety needs are characterized as needs for protection against danger, threat, and deprivation. Job security falls into this category. Note that money or economic factors can be used to basically satisfy most of the needs contained in these first two categories.



3. *Social* needs come next in the hierarchy and represent the beginning of belonging, for association, for acceptance by peers, and for giving and receiving friendship and love.



4. *Ego* needs are divided into two groups. The first is related to one's self-esteem (i.e needs for self-confidence, independence, achievement, competence, and knowledge). The second is related to a person's reputation (i.e. , need for status, recognition, and appreciation). These needs are rarely fully satisfied.



4. *Self-fulfillment* needs are the most difficult to obtain and describe. These are the needs for the full realization of one's own potentialities, for continued self-development, for being creative in the broadest sense of the word. Maslow referred to it as perfect self-actualization, personal growth, self-awareness , or the peak experience.



Job environment versus Content

- In 1959 Fredrick Hezerberg published his motivation-hygiene theory, which proclaims that humans have two broad categories of needs that govern their behavior.
- One, which is common to all animals, is the need to adjust to the environment or to avoid pain.
- The other, unique to humans is oriented toward psychological growth and the desire for self actualization.

Job environment versus Content

- The first category is related to the job environment and the second to the job content.
- Herzberg's concepts are similar to Maslow's except that he does not accept the idea of different levels (hierarchy of needs).
- He argues that an individual can and does seek to fulfill physiological, safety, ego, and self actualization needs at the same time.

Money as a Motivator



Recognition as a Motivator



Motivation in a Stable Organization

- Most of us have been nurtured on the growth ethic. Therefore, on first thought about motivating technical performance in a period of no or little growth, one can easily presume that there must be something inherently bad about a stable organization.
- However, a stable organization may not be such a bad motivational situation after all. It may, in fact, present some unique opportunities for motivating performance.

Motivation in a Stable Organization

- From a motivational point of view, difficulties may occur in a stable organization from having an older staff with less current technical information, limited career opportunities, and possibly job security doubts.

Motivation in a Stable Organization

- To foster motivational opportunity and organization renewal, managerial strategies should involve clarifying and organizing in areas that management may have neglected during times of expansion: career opportunities, informal organizations, and work goals.
- The effectiveness of most technical organizations depends on the performance of their technical staff. despite of this, many organizations, including stable organizations, have more than token programs for staff development .

Motivation in a Stable Organization

- This problem is specially critical in stable organization , since such organizations are apt to employ the same technical people for some time to come.
- Management can attack this problem on many fronts, such as clarifying the issue of job security and applicable company policy, providing a technical promotion ladder to reduce the problem of promotional opportunities and financial initiatives, and having periodic changes in project assignments to satisfy the for challenging work.

Motivation in a Stable Organization

- Most technical people never work alone; they collaborate a varying degree with their colleagues in technical problem solving. In a stable organization many opportunities occur to enhance technical performance through informal organization. By its very nature, technical collaboration should be readily encouraged in an organization with a stable technical staff.

Motivation in a Stable Organization

- There are possible steps that management can take to enhance this technical collaboration, such as:
 1. Regrouping technical teams to overcome tendency of performance to level off in some technical teams.
 2. Developing key people in the informal organization that are helpful to their colleagues.
 3. Encouraging greater internal and external contacts to decrease the possibilities of obsolescence.



Motivation in a Stable Organization

- Technical performance can also be enhanced through measures taken to clarify or establish work groups. Assigning people to multiple tasks, increases challenge for technical people in a stable organization.
- Also, performance should be rewarded with more challenging work.
- In an organization with limited socioeconomic incentives available to it, the challenge in the next assignment may be a good way to recognize the good performance in the previous job.

Effects of Aging

Later Working Years 50-65	Motivated by prestige and the pleasure of doing a job well
Middle Working Years, 35 - 50	Motivated by titles and what others think of them
Age of Youth 20 -35	Motivated by money and pursuit of power

Effects of Aging

Employee's Goals as a function of age

Under 30	35 to 39	45 to 49
1. Work on projects requiring new technical learning	1. Live in a desirable location	1. Help company increase its profit
2. Live in a desirable location	2. Have employment stability	2. Live in a desirable location
3. Become more involved decision-making process	3. Work on projects requiring new technical knowledge	3. Have employment stability
4. Work on projects that influence business success of company	4. Work on projects that influence business success of company	4. Work on projects that influence business success of company
5. Help company increase its profit	5. Help company increase its profit	5. Gain knowledge of the Company Management practices
6. Become more involved with technical aspect of work	6. Work for a company with a good reputation	6. Work for a company with a good reputation

Discussion Questions

- The relationship of money to motivation and performance.
- What are the advantages and disadvantages of a policy of promotion from within.

Discussion Questions

- Discuss the implication of hiring a new doctor at salaries higher than the previous rate and then giving lower increases until they are back in line.
- Discuss the pros and cons of a policy of keeping the salaries within a hospital secret.

NEGOTIATION SKILLS

THE MEETING

- a decision-making body
- displays a blending of a number of individual talents
- meeting *team* concept

THE MEETING

- Negotiation involves a series of compromises.
- Everyone should gain something.

Types of Meetings in Construction

- in-house meetings
 - fact finding
 - decision making
 - coordination
- meetings between different organizations

Who Should Attend?

- Careful selection of those who will be in attendance is of vital importance to the success of the meeting objective.
- Never conduct a meeting with anyone when his or her attorney is present without contacting your own attorney to receive instructions as to the course of action to take.

HANDLING YOURSELF AT A MEETING

1. Determine who called the meeting.
2. Find out the reason for the meeting.
3. Understand the background of the subject.
4. Establish your own position on the subject.
5. Determine your goals or objectives before the meeting.

Seating Advantage

The position that you occupy at the meeting table can also have a significant psychological effect upon whether your ideas will get attention or whether you come out ahead on a negotiation session.

Where to sit??

1. Sit at the opposite end of the meeting room table from, or on the side closest to the leader.
2. If, however, the leader is the type who frequently consults the person next to him or her, sit next to the meeting leader.

Methods and Techniques

- Take a positive approach.
- Ideas should always be presented in a systematic and orderly fashion.
- Facts must follow a logical course toward the point that you are attempting to put across.

Methods and Techniques

- Prepare carefully ahead of time.
- Coordinate the activities of each of the people who are involved.
- Rehearse the presentation

PRINCIPLES OF NEGOTIATION

Generally, negotiation may be considered as the art of arriving at a common understanding through bargaining on the essentials of the contract, such as specifications, prices, time of performance, and terms.

- A negotiator, when fully aware of his or her bargaining strength, can know where to be firm and where to make concessions on prices or terms.
- The negotiation occurs when both parties with differing viewpoints and objectives attempt to reach a mutually satisfying agreement.

The negotiation process involves:

1. Presentation of each party's position.
2. Analysis and evaluation of the other party's position.
3. Adjustment of one's own position to as many of the other party's views as are reasonable.

The negotiation process :

- Generally, the best negotiation strategy is based upon being reasonable within the rules of the game.
- This involves objectivity in negotiations and an awareness that the negotiator's prime purpose is to obtain the best possible deal for the employer.

The negotiation process :

- A reputation for honesty improves the image of the negotiator and therefore the chance for winning.
- Negotiation is an adversary action, and complete disclosure of one's position may be counterproductive.

A negotiator must:

- Be a strong individual who is capable of controlling the members of the negotiating team.
- Be acquainted with the broad details of the issue, the work to be done, and the method by which the cost information was developed.

A negotiator must:

- Have freedom of action
- Be capable of :
 - organizing the team
 - planning the objective,
 - explaining the objective to the negotiating team members

The Philosophy of Team Playing

- Special positions or skills of the negotiators
- In- house meeting of the negotiation team
- How to act during the negotiation?
- When to ask for a recess?

Basic Negotiation Policy

There are two Negotiation approaches:

- Considering the package as a whole, overall method.
- Resolving each of the package elements separately.

Negotiation Guidelines

1. Keep the objective in mind.
2. Adjust your end to suit your means.
3. Exploit the line of least resistance.
4. Take an approach that offers alternative objectives.

Negotiation Guidelines

5. Keep your plan adaptable to changing circumstances.
6. Do not put your weight behind an approach while your opponent is on guard.
7. Do not renew an attack along the same lines or in the same after it has failed once.

TECHNIQUES OF NEGOTIATIONS

- Observing and learning from the experts.
- Commissar's Technique

- Negotiations that have broken down should also be detailed in writing, since statements of fact constituting an admission can be used in court.
- Also, interim agreements reached during negotiations can serve as a basis for final award in court.

Psychology of Negotiation

- Find out the other party's timetable for making a deal is always one of the objectives of a good negotiator, as it can have a decided effect on the outcome.

Psychology of Negotiation

- Never rush anyone who is not ready to make a quick decision.
- Know *real values* of the work to be accomplished.

Strategic Ploys

- Negotiations should be directed at the settling of major issues.
- Both the contractor and the owner should concentrate on the prospects of making a deal, not breaking one.

Strategic Ploys

- Never to bargain for the last possible penny but always "leave a little something on the table."
- It is not a good idea to alienate everyone through overzealous haggling.
- Develop a sense of how far the other party can go, and when to back off a little.

Setting the Pace

1. Make sure that you know the scope of the meeting.
2. Start off with some smaller issues.
3. Do not get into the position of waiting for the other shoe to drop.

Setting the Pace

4. Decide in advance whether it is to your advantage to reach a rough or a precise agreement.
5. Make sure that you are bargaining with an authorized person.

Setting the Pace

6. Have a walk-away price in mind.
7. Bear in mind that there is no one "best".
8. If the other side brings legal counsel, contact your side to see whether or not your attorney wishes to be present.

Who Won?

- In any transaction based upon sound analysis and realistic negotiation, both sides should be satisfied.
- Often, in winning the point, a good negotiator will leave something "on the table" for the other party.
- A face-saving gesture to keep a good relationship with the other party.



Integrated Supervision and Leadership Training Program for Central Office and Governorate Teams

Visit # 1 to Governorate X

Workshop 2

January 2004

Governorate X

Table of Content – First Visit

- *Day # 1*

- * *Governorate level meeting*
- * *Filling in Stake Holders Form*
- * *Filling in Clients Needs Forms*

- *Day # 2*

- * *District level meeting*
- * *Problems Identification*
- * *Filling in Critical Challenges Form (s)*

- *Day # 3*

- * *Wrapping up meeting*
- * *Picking The Most Effective Critical Challenges*
- * *SWOT Analysis*
- * *Prioritization*

Table of Content – Governorate Visit

- Outcomes

- * Identification of the Major Challenges***
- * Preparation of Action Plans***
- * Other outcomes***

- What Next to follow?

- *Follow up visit (second visit)***
- *Making sure that the plans are adequate***

Day # 1

Governorate level Meeting

- ★ Discussion of the Current Situation (Statistics)
- ★ Coverage Rate Vs. Crude Birth Rate.
- ★ Fill in Quarterly Report For the Central Office.
- ★ Identification of the malfunctioning Districts.
- ★ Setting on the District(s) to be visited in the second day.

Stakeholders Identification

درجة التأثير					Stakeholders
شديدة التأثير	مؤثرة	متوسطة	قليلة	منعدمة	
5	4	3	2	1	
					المحافظة
					1 المحافظ - وكيل الوزارة
					2 أعضاء مجلسي الشعب والشورى
					3 المجالس القومية للسكان - المرأة - الأمومة والطفولة
					4 الجمعيات الأهلية
					5 القيادات الطبيعية (شيخ البلد - العمدة - أعضاء المجالس المحلية)
					6 علماء ورجال الدين
					7 المدرسين
					8 الهيئة العامة لمحو الأمية وتعليم الكبار
					9 الجامعات (أعضاء هيئة التدريس)
					10 المنتفعات
					11 مقدمو الخدمة
					12 البرامج الصحية لتحسين الخدمة
					13 العاملون في مجال الإعلام
					14 الأحزاب
					15 الجهات المانحة
					16 القطاع الخاص (صيادلة - أطباء - دايات)
					الوزارة:
					1 الوزارة - رئيس القطاع

Client Needs Identification

درجة التأثير					المنتفعات
شديدة التأثير	مؤثرة	متوسطة	فكيلة	منعدمة	
5	4	3	2	1	
					1 استمرارية مقدم الخدمة
					1 مراعاة الخصوصية السمعية والبصرية
					2 سهولة الوصول إلى الخدمة
					3 استمرارية الخدمة
					4 الأمان
					5 المشورة الجيدة
					6 المساواة في تقديم الخدمة والعدالة
					7 توفير الوسائل والأدوات اللازمة
					9 مكاني الخدمة والانتظار مناسبان
					10 قصر الوقت اللازم للحصول على الخدمة
					11 المعاملة الحسنة
					12 الأسعار المناسبة للوسائل (الالتزام بذلك)
					13 إعطاء المنتفعة الفرصة كاملة للسؤال
					14 إعطاء المنتفعة حق اختيار الوسيلة بعد تقديم المشورة الكاملة
					15 تزويد المنتفعة بالمطويات والمواد الإعلامية
					16 متابعة المنتفعة وتشجيعها على العودة والسؤال في أي وقت
					17 مراعاة الدور في تقديم الخدمة
					18 استئذان المنتفعة قبل توقيع الكشف عليها
					19 متابعة المنقطعات عن الخدمة
					20 توفير خدمة متكاملة (التحويل إلى مستويات أعلى)

درجة التأثير					المنتفعات
شديدة التأثير	مؤثرة	متوسطة	قليلة	منعدمة	
5	4	3	2	1	
					21 إمداد المنتفعة باحتياجاتها البيئية والاجتماعية
					22 التكثيف الصحي لها ولبناتها
					23 تحسين الخصائص السكانية
					24 دعم مشاركة الرجل
					25 وجود نادي للمرأة كامل ومؤث (تلفزيون- فيديو - ماكينة خياكة - ...)
					26 إكساب المرأة مهارات حياتية (حقوق المرأة - المرأة العربية تتكلم - ..)
					27 إعلام المنتفعة بحقوقها داخل العيادة
					28 توفير خدمات الكشف المبكر عن أورام الثدي وعنق الرحم
					29 توفير خدمات فحص ما قبل الزواج للمرأة والرجل
					30 المشورة والعلاج للسيدات بعد سن الإنجاب
					31 مباراة الاربعين

Day # 2

District level Meeting

- ★ On site Investigation of the problems resulted in causing the District's low performance.
- ★ Filling in the problems form in the Central Office Quarterly report form.
- ★ Focus on Leadership abilities in dealing with problems. (Ability-Persistence-Persuasion-Lead Meeting-Coaching-Motivation-Charisma)

Identifying Critical Challenges

Internal Challenges

درجة التأثير					تحديات داخلية
شديدة التأثير	مؤثرة	متوسطة	قليلة	منعدمة	
5	4	3	2	1	
					1 عدم افتتاح بعض مقدمي الخدمة
					2 تضارب الرسائل الإعلامية
					3 عدم التنسيق بين الجهات المختلفة
					4 نقص الأطباء بوحدات الرعاية الأساسية وتنظيم الأسرة
					5 تعدد مهام الطبيب بالوحدة الصحية مما يقلل من الاهتمام بتنظيم الأسرة
					6 المركزية في اتخاذ القرار
					8 توفير التمويل الداتي
					9 تفعيل دور نظام المعلومات من خلال توافر المصدقية للبيانات والمعلومات السكانية
					10 تطبيق نظام الجودة المستمرة بجميع منافذ تقديم الخدمة
					11 تحقيق تكامل خدمات الصحة الإنجابية وتنظيم الأسرة مع الخدمات الطبية والصحية الأخرى
					12 التغلب على الاحتياجات غير الملباة
					13 تبني مفهوم طب الأسرة
					14 تحقيق استمرارية برامج ومشروعات تنظيم الأسرة والصحة الإنجابية
					15 قصور نظم الصيانة للعيادات المتنقلة
					16 نقص المطبوعات والسجلات
					17 نقص التجهيزات والآلات للوحدات التي تم افتتاحها
					18 العجز في مجموعة تركيب اللوالب
					19 عدم وجود سيارة إعلام
					20 عدم تثبيت الرائدات الريفيات

External Challenges

تحديات خارجية					
شديدة التأثير	مؤثرة	متوسطة	فئوية	منعدمة	
5	4	3	2	1	
					1 العادات والسلوكيات
					2 ارتفاع معدلات الزواج المبكر
					3 الشائعات
					4 نقص التمويل
					5 ارتفاع معدل عمالة الأطفال لكسب الرزق
					6 ارتفاع نسبة الأمية
					7 عدم تعايش القيادات السياسية مع المشكلة
					8 عدم تصنيع الوسائل محليا والاعتماد على الاستيراد
					9 ارتفاع معدل بطالة المرأة
					10 عرظة القطاع الخاص للعامل بالمجال الصحي لظنة الوعي أو تعارض المصلح
					11 التدخلات الخارجية التي قد تؤثر في صنع القرار
					12 الوصول بالخدمة إلى الأماكن المحرومة والناحية
					13 تبني المحليات للقضايا السكنية وتنظيم الأسرة
					14 تبني مفهوم الأسرة الصغيرة على مستوى المجتمع ككل
					15 تبني علماء ورجال الدين للقضايا السكنية

Day # 3

Final Meeting

- ★ Wrapping up meeting with the Governorate Personnel.
- ★ Visit outcomes Evaluation
- ★ Requirements for the next visit
- ★ Further Assignments (if any)
- ★ Motivation Schemes
- ★ Final Identification of the Major Challenges.
- ★ SWOT Analysis for Major Challenges.
- ★ Prioritization Matrix

SWOT

مشكلة نقص الألبان

S

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١- وجود طبيبات وأطباء بأقسام

النساء والتوليد

٢- وجود إعيادات بالتنقله

١- وجود كلية طب بالمحافظة

٢- تعاون المحافظة والقطاعات

السياسية والإقليمية

W

T

١- سوء توزيع الأطباء

٢- نقص الرفعات المكافئة من

الأطباء

١- الوساطة بينه بالتوليد

نقص الزيادة في الاستخدمات

S

- ١- مبادرة الأربعمائة
- ٢- وجود فريقه اجراف قوى ومدرب
- ٣- وجود نخبة خدمت لهم منبره
- ٤- توفير معظم الوسائل
- ٥- وجود تنفيذ كاف
- ٦- وجود ادارة التقصيف لصحى داخل المنبر

O

- ١- وجود دعم من رئيس المدينة
- ٢- وجود نواه لفصول نحو الأمانة
- ٣- تنفيذ التبريد الاستعدادات للتفصيل مع الجهات الأخرى
- ٤- الأمانة والصحافات
- ٥- وجود رجال دينه مدربين

W

- ١- عدم وجود رائدات
- ٢- عدم وجود تعاونه مدير عامه بالأمومه والمضونه
- ٣- نقص التمويل الذاتي لشراء بطرقات والقفايات وتفعيل العمل
- ٤- عدم وجود نوادى للمرأة
- ٥- نقص بعض الوسائل من بعض الفترات

T

- ١- وجود بعض استراتيجيات لبعض الوسائل
- ٢- عرقلة القطاع الخاص لقلته الوعى او تعارضه المصالح
- ٣- عدم تعاونه الجمعيات الأهلية

Prioritization

Effect	5	10	15	20 نقص التمويل الذائي	25 التعاون من رعاية الامومة و الطفولة
	4	8	12 عدم وجود رائدات	16	20
	3	6	9	12	15
	2	4	6	8	10
	1	2	3	4	5

Execution

Weakness Prioritization Matrix

Effect	5	10 الصحافة و الاعلام	15	20	25 الخطة الاستراتيجية 1. رجال الدين 2. المطبات 3.
	4	8	12	16	20
3	6	9	12	15	
2	4	6	8	10	
1	2	3	4	5	
				Execution	

Opportunities Prioritization Matrix

Action Plan

...next to follow

Outcomes

- ★ Major Challenges Identification.
- ★ Preparation of Action Plans.
- ★ Other outcomes.
 - Adaptation of the trainers to the system.
 - Friendly Atmosphere acquires more Confidence to both parties.
 - Combination between Trainers-Central Office and Governorate personnel minds usually come up with non-traditional ideas, which are needed at the current project stage.

What Next To follow?

- ★ Preparation for the Second visit.
- ★ Making sure that the plans meet the requirements and are timely executed.

Third Workshop





ADVOCACY AS A LEADERSHIP SKILL

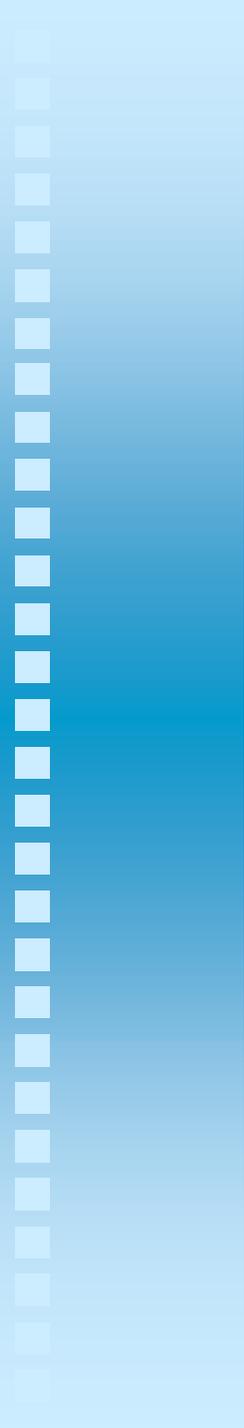
Background

The managers are expected now to lead their teams into the new world. To accomplish this, they need to become strong, fast-stepping leaders. They are in need of **ADVOCATING**.

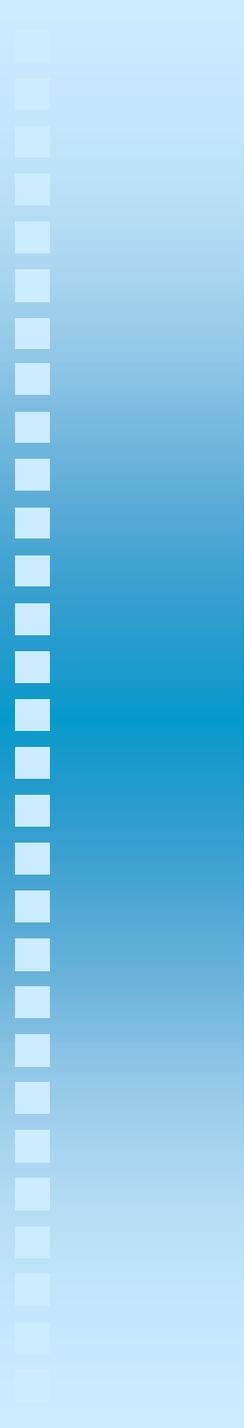
ADVOCATING VS. INSPIRING

- More and more management and leadership need advocacy:

1. Budget Decreasing.
2. Less Time.
3. Need More Help



- You need to convince others of the importance and the criticality of your project or mission.



- As a consequence, the effective leader will need to create urgency around a vision of a new working model that will change thinking and behavior within a very restricted time-frame and ultimately achieve results.

The effective managers are leaders who are successfully transforming their organizations to bring them up to speed by advocating for their ideas and needs.

Target Group For Advocacy:

- 1. External; NGOs, CDAs, Other Sectors of the Gov.**
- 2. Internal; Minister, Governors, MCH Director, Under Secretary of Health.**

Advocacy Experience

- 1. Your Experience.**
- 2. Tips and Techniques.**
- 3. How to use advocacy with your current action plans.**