

עַת רְצוֹן FIELDBOOK



Rabbi Elliot Salo Schoenberg



Joint Commission on Rabbinic Placement

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Dear עת רצון participant:

Welcome to the annual workshop on transition called עת רצון. We are delighted that you are joining us for this special program. We expect it to be a wonderful interactive learning experience for the participants (and facilitator, too). Our goal for this seminar is to deepen our understanding of the process of transition, create a model for successful transition and be reflective and purposeful about the next eighteen months. Attached please find the proposed schedule for our time together. We start the formal program each day at 9:30 am. Continental breakfast will be available starting at 9:00 am.

In order to get the most benefit out of our time together, please read “Eit Ratzon: The Theory and Practice of Transition,” from *ALIYAH: The Rabbinic Search as a Religious Experience*, which you should have already received. Please contact Rabbi Jan Caryl Kaufman in the RA office, jkaufman@rabbinicalassembly.org, if you need a copy of this reading. This summary of transition theory lays the foundation for our learning experience together.

Second, please think of a transition from your past, and answer these questions about it in a one page essay. Describe the transition – what do you remember? How were you different afterward than before? Did it cause you any difficulty? Did anything or anybody help? If so, how? When did you feel comfortable again and accept the new situation? How do you feel about that transition now?

We look forward to meeting you personally.

Best Regards,

Rabbi Elliot Salo Schoenberg

WELCOME

You are here now! Whatever and whomever you left home will be waiting for you when you return, so there is no need to keep yourself from being here now. Here are some ideas that might help enrich your experience at this conference.

1. Smile a lot. It is healthy and it may be catching!
2. Take a risk. Be open to new ideas.
3. Pick and choose what works for you.
4. Take care of yourself. Be active mentally, emotionally, physically and spiritually.
5. Keep notes: thoughts, ideas, issues raised, reactions, etc.
6. Ask to clarify language and ideas that seem unclear. Challenge me. It keeps me honest and learning.
7. Practice the 180 degree rule – Go toward, not away from, that which causes tension.
8. Be gentle with yourself.
9. Take home at least one new idea.
10. Enjoy yourself!

Created by Rabbi Elliot Salo Schoenberg

ANNUAL עת רצון - TRANSITION WORKSHOP

Offices of the Rabbinical Assembly

9:00 am	Breakfast
9:30-9:45	Welcome/Opening Exercise and דבר תורה
9:45-11:00	Session I: Principles of Transition – Stages according to William Bridges
11:00-11:15	Break
11:15-12:30 pm	Session II: Start Up
12:30-1:30	Lunch – A Time to Network
1:30-2:45	Session III: Success – Some Definitions / Role Expectations
2:45-3:00	Break Followed by מנחה
3:00-4:00	Session IV: Definition of Supervision – Coaching and Criticism

Bibliography:

Managing Transitions, by William Bridges

From Generation to Generation, by Ed Friedman

Difficult Conversations: How to Discuss What Matters Most, by Douglas Stone, Bruce Patton, Sheila Haen

Leadership on the Line, by Ron Heifetz and Marty Linsky

JEWISH RULES OF ENGAGEMENT, BASED ON MUSSAR PRINCIPLES

כבוד הברית: (*kavod habrit*) Respect for different points of views and for different levels of Jewish knowledge

צימצום: (*tzimtzum*) make space for others; extraverts – be aware of how much you speak; introverts – encourage yourselves to share and create

שמירת הלשון: (*shmirat halashon*) guarding one's tongue; being respectful in speech

סבלנות: (*savlanut*) patience...the workshop is a process

דעת: (*da'at*) mindfulness; being aware of what you are thinking and feeling

נדיבות: (*nedivut*) generosity of spirit

מוקד: (*moked*) stay on task; focus; use “parking lot”

למוד: (*limud*) ask questions if you do not understand

סודיות: (*sodiut*) confidentiality; what you say stays in this room

לשון הטוב: (*lashon hatov*) give compliments

זה לחד - זה לחד: (*zeh lihud-zeh lihud*) one person talks at a time

מארבע כנפות הארץ: (*me arbah kenifot ha-eretz*) learn from others

מה טבו אהליך יעקב משכנתיך ישראל. ואני ברב חסדך אבוא ביתך,
אשתחווה אל היכל קדשך ביראתך: ה' אהבתי מעון ביתך, ומקום משכן
כבודך. ואני אשתחווה ואכרעה אברכה לפני ה' עשי. ואני תפילתי לך ה',
עת רצון, אלהים ברב חסדך, ענני באמת ישעך:

JOURNALING

1. JOURNALING, REFLECTING, PLANNING FOR FOLLOW-THROUGH

Whether it be through keeping a personal learning journal or another form of notes, your ability to apply lessons from this seminar will be greatly enhanced through reflection and making note of your thoughts, feelings and ideas.

Throughout the course you will be asked to make specific notes regarding the application of learning to your own organization. Hence the pages that say PAGE LEFT BLANK FOR NOTES

You will be expected to review the content of this course and your learning outcomes with your colleagues back home. The purpose of these discussions includes: a) communicating your learning outcomes, b) communicating applications that you envision for your own area and responsibility, c) engaging your synagogue membership in a way that elicits their input and provides you with a deliberate way to gain their support and coaching.

It will be useful for you to reflect and note, or journal, your reactions to the following questions:

- 1) What was the primary focus for each topic of the course?
- 2) What did you notice during each exercise? What reactions and feelings were aroused?
- 3) What were the important personal or work-related insights?
- 4) What are the implications of these insights for you in your role as a leader and manager?
- 5) Based on these insights, what will you do differently in the future?
- 6) What support will be necessary for you to follow through on implementing changes that you plan?
From whom? How will you get it?
- 7) For the activities that you engaged in as part of the homework assignment, what process did you use?
- 8) What did you learn from the processes you chose to use?
- 9) Upon reflection, what would you have liked to have done differently? Why?
- 10) What was different than what you may have done before this training and what was the impact of the training?
- 11) SWIFT Culture – Based on what you have done, and the discussions within this group, what observations or conclusions might you draw about the SWIFT culture?
- 12) What are the implications for you as a leader/manager?
- 13) ACTION COMMITMENTS:

TO BECOME A BETTER LISTENER I NEED TO:

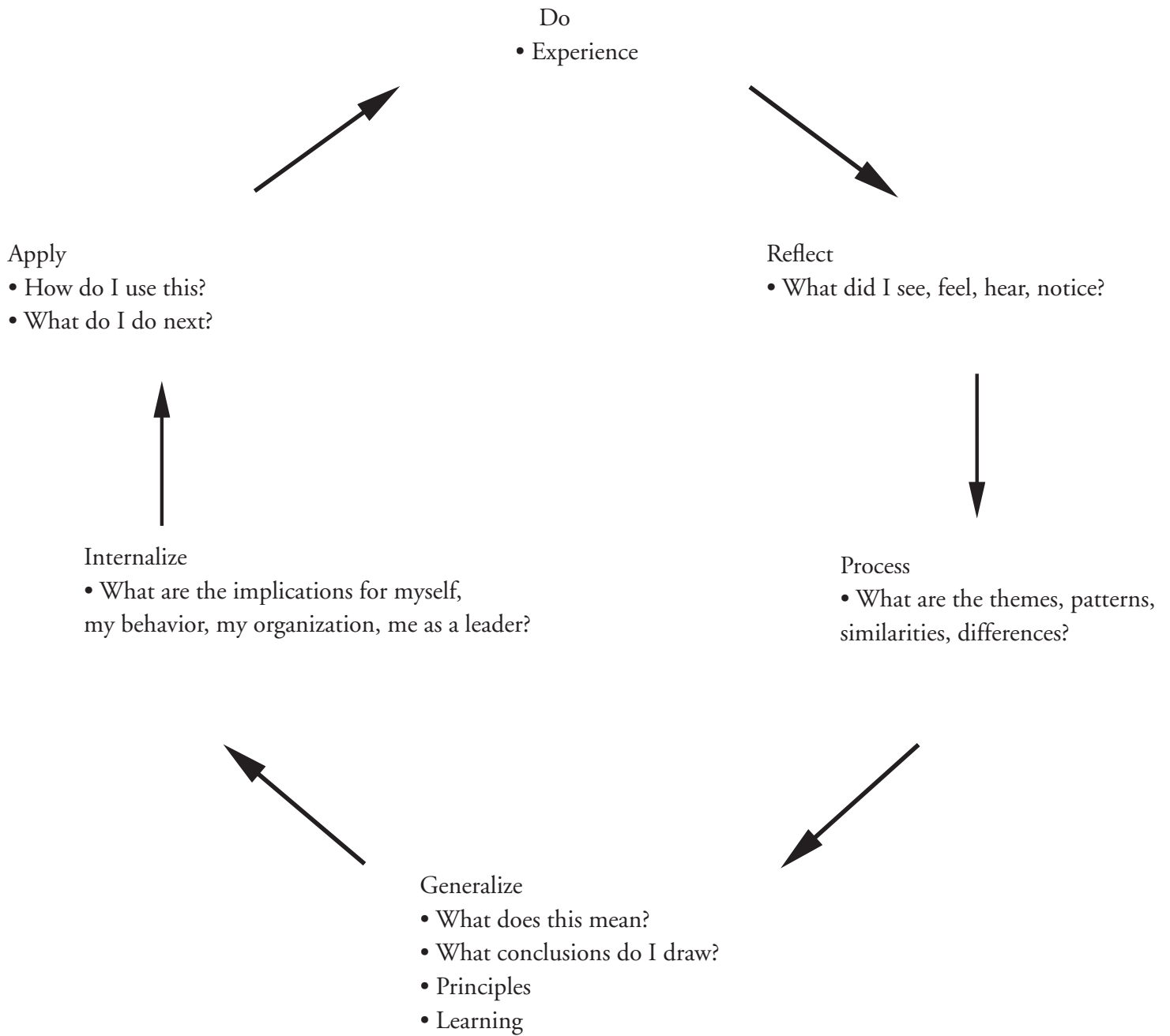
a. Do more:

b. Do less:

c. Stop doing:

d. Start doing:

EXPERIENTIAL LEARNING



[illegible]

OUR GOALS FOR THE SESSION

1. Introduce transition theory
2. Learn the difference between change and transition
3. Provide some tools for use in the your own transition process
4. Learn a vocabulary of transition
5. Offer tools and tips to start off well
6. Have fun!

[illegible]

TRANSITION

- I. DEFINITION: Transition is an internal, three-phase, psychological reorientation process that people go through in coming to terms with change.
- II. Differences between change and transition:

CHANGE	TRANSITION
Event/announcement	Process
Short term/relatively quick	Include the time leading up to and settling in afterward/slow moving
One shot	On-going
Physical	Physical, psychological emotions (watch for those), and spiritual consequences
Usually planned	Not attended to
Linear	Circular
Situation/external	Psychological/internal
Outcome/focused	Process based
GAIN	LOSS
Program	The human element
It's not the change they resist, but the transition	

III. What Changes in a Transition?

We are leaving a position and starting a new one – that is change, but also transition.

- It can change your roles – you have a baby, and suddenly you've become a parent; you change jobs, and you take on a whole new set of responsibilities; you were a student, now you're a teacher.
- It can change your relationships – being a parent puts you in touch with new people, as does a new job. Both experiences may also transform your existing relationships.
- It can change your routines – a new baby alters living and sleeping habits; a new job may require a shift in schedule and in commuting patterns; no more 8:30 classes but now you have the possibility of Monday/Thursday morning minyan.
- It can also affect your assumptions about yourself and the world – a new father discovers he's more protective.
- Find new aspects of yourself "I am more than a spiritual leader."

THE STAGES

Three distinctive stages: Leaving, Neutral Zone and Start-Up

A. Endings:

Things “stop” and that is external. When we say “end,” we mean something internal – the way that things have been experienced, related to, counted on is over. A piece of one’s life is gone. That is why endings have so much impact. The big issue is letting go. We tend to underestimate impact leaving has on us.

- Be intentional
- Not deal with it now; will have to go back later

Greatest loss

- Is comfort zone
- What to expect
- Physical relocation

For students

- It is student community

Best way to deal with it:

- Understand what’s over and what’s not – reflective
- Symbolic gesture
- See grieving as normal

B. Neutral Zone: The nowhere between two somewheres – “*tohu vevohu*”

The in-between states where the old way of doing things, the old identity, or the old life is gone, but the new one hasn’t yet become operational or effective. It is a chaotic time and one when people are tempted to go back to the past or to bail out completely. Sometimes it seems like a dead, empty time when nothing is happening and very little gets done.

- Chaos
- No man’s land
- Out of sync
- Appears to be unproductive –but doing important internal work
- Uncomfortable but natural
- Time when old wounds re-emerge

Best way to deal with it:

- Name it – surface
- Journal – time alone
- Think of it as a blessing

C. Beginning/Start Up:

The emotional renewal of commitment to and identification with an organization. It comes slowly after a healing process. It’s not just “starting” something new, which can be done mechanically. The beginning really involves a new identity, a new sense of purpose, and a new sense of meaning. Both excitement and anxiety.

Start Up:

- Problems with beginning usually are really problems with endings
- Rebuilding the world –creating the new identity takes time – for you and for them
- Different people do this at different speeds
- Work on your shadow

SUMMARY POINTS:

- 1) Multiple transitions are going on – not just one.
- 2) You inevitably go through the transition – sometimes you get stuck. Simply understanding the theory will not stop you from experiencing the impact of transition yourself.
- 3) In order to help others, you must help yourself first. You can be ready for a change and still have it throw you for a loop.
- 4) There is an overlap of emotions.
- 5) You are not the only one going through transition; your family is going through it as well.

BRIDGES' STAGES OF TRANSITIONS

ENDINGS

- loss
- letting go
- getting closure
- saying good-bye
- feelings of fear, anger, uncertainty

NEUTRAL ZONE

- in-between time
- chaos
- no person's land
- neither here nor there
- time for introspection
- feelings of confusion, self-absorption, out of sync, not yourself, tired

NEW BEGINNINGS

- new lease on life
- emotional renewal
- new identity
- sense of new beginning
- new source of meaning
- feelings of excitement, anxiety, relief

Based on the work of William Bridges and Richard Beckhard

STAGES OF TRANSITION

1. Numbness – self-esteem at base line
 - Shocked – Overwhelmed – Immobilized
2. Denial
 - Nothing but positive feelings, high self-esteem
 - Present/future
 - Defensive – euphoria
 - Minimization of what's to come
3. Self-Doubt – self-esteem declines
 - Powerlessness – hopelessness – anger
 - Changes are coming
4. Acceptance – questioning the ability to let go
 - Neutral zone, I have to let go; come out of the pit
5. Testing – energy returns
 - Begin to think about the future
 - Trying out new behaviors
 - Starting new relationships
6. Search for Meaning – self-esteem enhanced
 - Reflect on what we were and how far we've come
7. Internalization – we are reborn
 - Incorporating the new behavior
 - Making meaning of the transition

That which applies to individuals, applies to institutions as well.

Based on the work of William Bridges and Richard Beckhard



FIGURE 1-2. Linear causation.

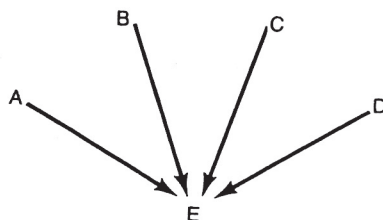


FIGURE 1-3. Multiple causation.

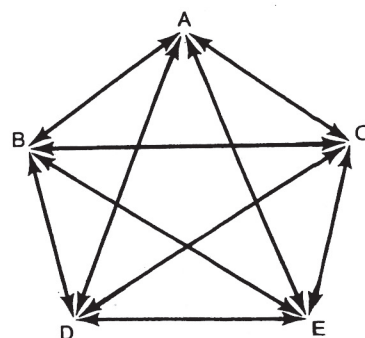
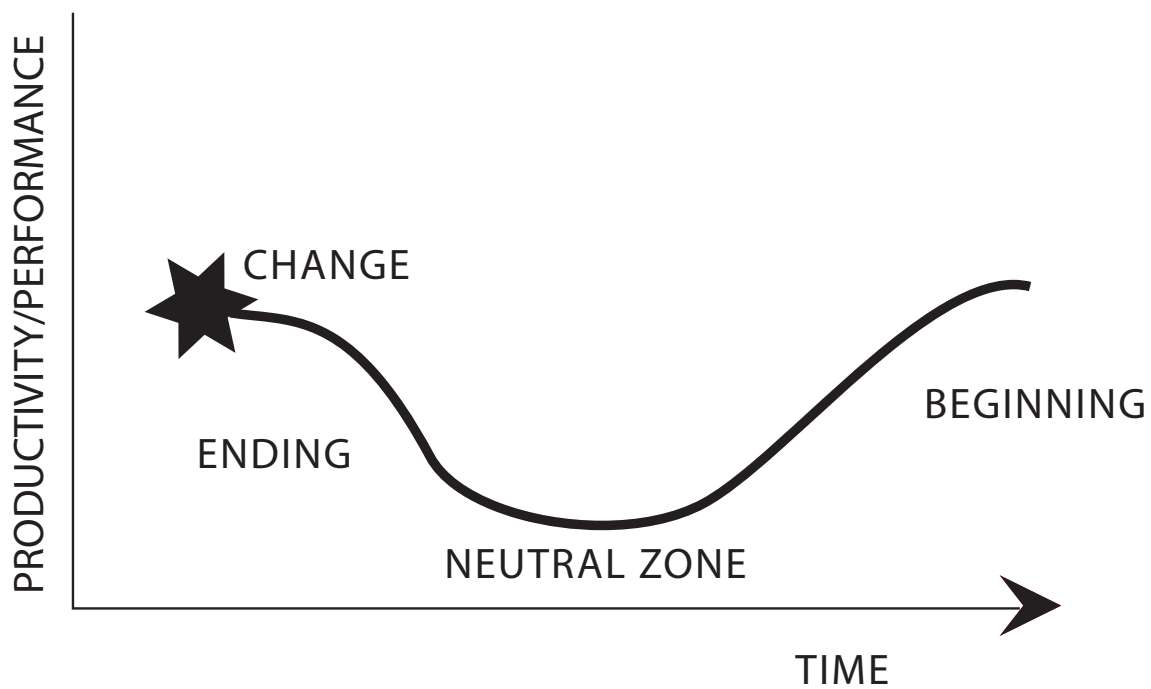
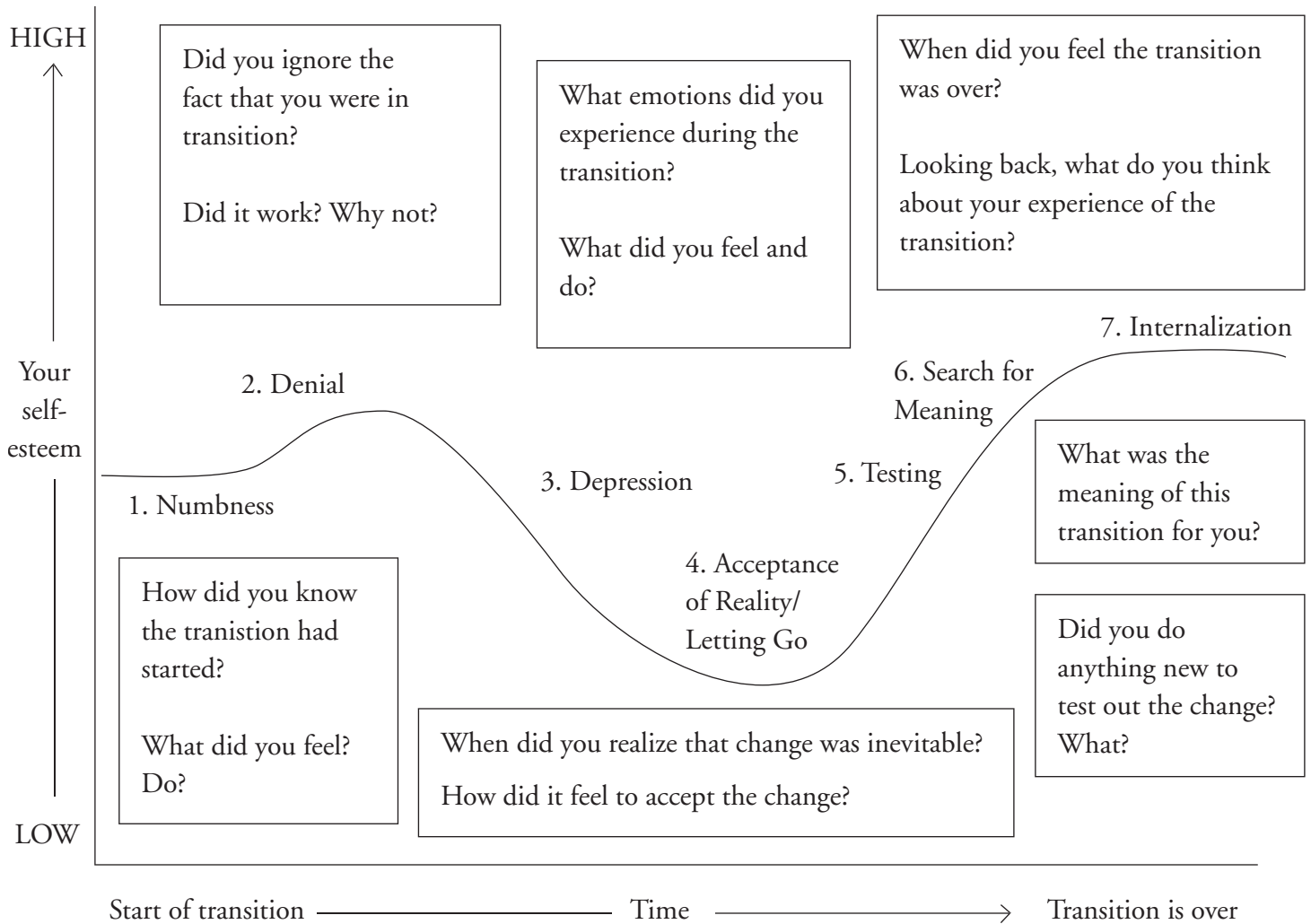


FIGURE 1-4. Systems thinking.



CHANGES IN SELF-ESTEEM DURING TRANSITIONS



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TIPS FOR MANAGING ENDINGS

1) Identify what is ending

- Define what's over and what isn't.
- What chapter is finished?
- What are they leaving behind?

2) Identify who is losing what.

- Have the family describe the change in as much detail as they can. What is actually going to change?
- What are the secondary changes that this change will probably cause?
- Who is going to have to let go of something? What are the feelings associated with that?
- Ask others to identify for other family members what they think they are losing.

3) Encourage them to accept the reality and importance of the subjective/emotional losses.

- Don't argue with what you hear.
- Be accepting of the pain. Do not try to "Logic" it away.

4) Don't be surprised at "overreaction"

- Remember that being reasonable is easy if you have nothing at stake. If it is a piece of their world that is changing, they will react more than you. Remind the family of this.
- If old losses haven't been adequately dealt with, your ending may set off this need to grieve.

5) Acknowledge the losses openly and sympathetically.

- Even when you think/feel the other person is being unreasonable, infantile, hysterical, it is your job to say "There, there, I understand your pain and loss."

6) Expect and accept the signs of grieving.

- Be concerned when people seem to be taking it matter-of-factly. There is always loss in change, and always a reaction . . . although, it may be more potent in some people than in others.
- Encourage people to talk about what will be changing for them
- Frame, or re-frame the loss for folks

7) Compensate for the losses by asking, "What can be given back to balance? What has been taken away?"

8) Give people information, and do it again and again, ad nauseum.

- Communicate, communicate, communicate. There can never be too much information.
- People tend to have "Swiss cheese brains" when they are under stress, so repeating the message over and over again helps.

9) Mark the endings.

- Rituals
- Mourning
- Celebration
- Retelling of history/myth

10) Treat the past with respect.

- Don't denigrate the past.
- Encourage people to take a piece of the old with them.
- Show how the ending ensures continuity of what really matters.

Based on the work of William Bridges and Richard Beckhard

GOODBYE CARD

I, _____

in recognition of the need to let go of

Do so symbolically by naming it here and

sending it on its way.

TOOLS TO MANAGE ENDINGS – “A CHECKLIST”

Evaluate how the following statements describe your organization’s situation. They all describe things that would help to manage the endings that are taking place. At least some of them ought to be part of your transition management plan.

1) People understand exactly what is over and what isn’t.

2) We’ve used symbolic “boundary” actions and a ceremony to mark our clean break with the past and show that today is really different from yesterday.

3) People are getting all the information they need; we are saying everything more than once in several different ways, and we are using different channels to do it.

4) People feel that their losses are being seen and acknowledged.

5) Our managers understand and accept “grieving” as natural and necessary and are not getting in its way.

6) We’ve “solved the problem,” but have also been careful not to denigrate the past.

7) We’ve carefully removed anything that would give people an excuse to hold onto the past.

8) Find an interim project.

9) Find a re-frame – metaphor.

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NEW BEGINNINGS

- A) Beginnings are the easiest part of transition. The problems that people have with beginnings are likely to be problems with endings or neutral zones, but since organizations try to overlook those phases of transition and start with the beginning, it is that final phase that gets the blame.
- B) It is useful to help people to see the difference between start and beginnings. It is the new situation that starts. That can happen on Day One. When somebody objects to your transition-management efforts on the grounds that, “We have to get started right away,” agree with them. Many changes do, indeed, have to be made immediately.
- C) But then, point out that although the start can happen right away, the beginning, which is getting everyone *realigned* behind the start cannot. The beginning requires that people are comfortable with their new identities, that they have rebuilt their worlds, and that they feel at home and confident again. That is going to take them time.
- D) A final note about beginnings – it is natural for people to reach their beginnings at different speeds. There are many reasons for this:
- The planners started their transition first. (Remember the marathon effect.)
 - Different temperaments come to terms with change more or less quickly.
 - Individuals and groups were impacted by the change to different extents – i.e. people differ in how difficult the end is for them.
- So, expect and allow for different speeds in the transition process.
- E) But there are also certain actions and conditions that facilitate new beginnings, and while their effects won't be felt quickly, they should be started soon after the changes have been planned.

CREATE TRANSITION COMMITTEE

1. First agenda is to have no agenda
2. Plan self-care
 - a. Time when family needs you
 - b. Your self-support group
 - c. Stress – what do you need to do to take care of yourself
 - d. Balance
 - i. Family
 - ii. Physical
 - iii. Mental-academic
 - iv. Emotional-relational
 - v. Spiritual
3. First impressional count
 - a. hard to overcome
 - b. be intentional
 - c. what is your symbol
4. Personal relationships are the priority
 - a. be a lover, not a programmer
 - b. parlor meetings – broad sense of support – ask them
 - c. visit the ill, one year later
 - d. repay *shivah* visits a year later
 - e. learn history of important families
 - f. learn strength and weakness of laity – whom can you trust
 - g. what are you going to do to build trust
5. Slow down changes
 - a. stress continuity
 - b. affirm history
 - c. lay people make list of changes they want-so you know-this is the place to start
 - d. number one issue for USCJ congregations is changing a custom (like what time services start) without consultation.
6. Look at surprises
 - a. communication issues
 - b. expectation
7. Watch for first conflict
 - a. information
 - b. not avoidance but waiting for information
 - c. not resolve, learn to manage
8. Ghost of former rabbi
 - a. allow for reactivity
 - b. not just one predecessor
9. Time for testing limits – time management

10. Administration
 - a. time to get to know staff
 - b. do team building
 - c. meet with committees, get projects going
11. Documents – 2 years worth
 - a. bulletins, board meeting, ritual committee
 - b. way to learn the synagogue way of being
12. Discover your community tour
 - a. with representative from congregation
13. Programing
 - a. showcase your talent
 - b. Pareto Principle – Wilfred Parento-19th century economist
 - c. 20% of your activity should produce 80% of your product
14. Learn synagogue culture
 - a. do dictionary
 - b. do wall of wonder
 - c. do six adjectives
 - d. draw map of internal space
15. Do self-reflection

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NEGOTIATING EXPECTATIONS

1. The Difference Between Important and Urgent

- a. Urgent means it requires immediate attention. “Now.” Urgent things act on us like a ringing phone. They are visible. They press on us. They insist on action.
- b. Important has to do with results. It contributes to mission, your values, your highest goals. We must act to seize the opportunity to do important matters. On the day before the inauguration of JFK, Eisenhower said, “You’ll find no easy problems come to the President of the United States. If they are easy to solve, somebody else would have solved them.” The importance of relationship-building, planning, recognizing new opportunities.
– Stephen Covey
- c. High Importance/High Urgency: Tackle these projects first
- d. High Importance/Low Urgency: Set deadlines for completion and work them into your daily routine.
- e. Low Importance/High Urgency: Find quick, efficient ways to get these done without much personal involvement.
Delegate to a ‘can do’ assistant
- f. Low Importance/Low Urgency: Busy or repetitious work, like filing.

2. The Parato Principle – 19th century economist, Italian Jew Wilfredo Parato

- 20% of our time produces 80% of the results
- 20% of your activities produce 80% of your rabbinic accomplishments
- 20% of the people take up 80% of our time
- 20% of the products bring in 80% of the profit
- 20% of the book contains 80% of the content
- 20% of our work gives us 80% of satisfaction
- 20% of the presentation produces 80% of the impact
- 20% of the people will eat 80% of the food!
- Need to focus on the most important 20% goals

3. The relational characteristics are the sources of satisfaction in a congregation, while an inadequate functional characterists-like program leads to dissatisfaction. There is no direct relationship between the two. To lower the level of dissatisfaction does not raise the level of satisfaction. To reach the level of satisfaction does not lower the level of dissatisfaction. The level of satisfaction needs to be higher than the level of dissatisfaction to have a sense of confidence and competence. -Kennan L. Callahan

4. The Bell Curve



10% are the early adapters, always on board. 10% never adapt or adopt.

80% want to be convinced. Open minded.

Unsuccessful politicians spend 80% of their time with the early adapters and the hard-core refusenicks.

Successful politicians spend 20% of their time with the fringes and 80% with their constituency that need persuasion. -Dr. Len Hirsch Organizational consultant to the Carter White House

5. The Unimportant

- a. “The art of knowing what to overlook.” William James
- b. “You cannot overestimate the unimportance of practically everything.” John Maxwell
- c. We are efficient. We do things right. We become effective. We do the right things.

YOUR PRIORITIES	YOUR ORGANIZATION’S PRIORITIES
1.	1.
2.	2.
3.	3.

[illegible]

COMMUNITY BUILDING PRINCIPLES

Definition of Community: more than a small group, more than social bonding, working together to create something of value; a sense of belonging.

1. Be a Compass: Enhance meaning. The ability of the leader to make activity meaningful for those present, not to change behavior but to give others an understanding of what they are doing. Why rabbi is called spiritual leader. Articulate the norms – why preaching still valuable – put frame around an idea or an event – religious lens to color the secular world – multiple pathways towards the common value – articulation of embracing and compelling prayers.
2. Create Opportunities for frequent interaction of members: when you get them into the building, good things happen – synaplex but one kiddush – do in-reach.
3. Feng Shui – Create Common Physical Space: structure, environment and architecture all impact people. How are the seats arranged?
4. Affirm People: Find a way for everyone to contribute; inclusiveness of diverse people – the leader does not have all the answers
 - a. Empowerment of each member – shared leadership.
 - b. Why team Torah discussion works well on Shabbat morning – not everyone the same; Generation Y wants it to be interactive.
 - c. Recognize life-cycle events at services – more important than a birthday card.
 - d. Figure out how to welcome new members.
5. Collective Memory: Also called continuity. Create opportunities to make memories, do significant things together, shared experiences. Take the Board on a bus trip to do a mitzvah. Sing the familiar tunes on Rosh Hashanah.
6. Teach Values: Leader as educator; find ways to evoke and embody guiding principles; where the leader spends time; reflective conversation.
7. Epistemology: Call it community; *Kehilah Kedoshah* or the Queensboro Hill Jewish Center – In mission statement, in membership brochure, in name, every opportunity.
8. Public Talk: Forums in which members can work through the key issues – members talk about the values . Shared values and shared space meet. Values are in dialogue.
 - a. Formal programs or water coolers – meaningful dialogue around a text – use as an opportunity to share personal narrative.
9. Create a safe place: Networking or caring individuals who invite each other – there are no outcasts; value the integrity of the other person; - institutionalizing; steps toward conflict resolution. Fight gracefully – listen, listen, listen – foster a sense of trust – protect those who disagree with you – what Ron Heifetz would call a “holding environment.”

10. Be calm: When the system is fluid or confused, the leader provides grounding. Expect to be attracted for articulating values.
 - a. Be resilient; contain yourself emotionally – stay calm – be predictable – don't take it personally.
11. Communicate well and often: communication and community have the same root. No surprises – easy access to information – each segment of the community understands what others want and need – use email and the internet.
12. Be an historian; an agent of tradition: Tell stories; explain “the way things operate around here.” – develop and display system's symbols – how do new members learn the history; hear the stories? – honor the founding members.

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Rabbi Elliot Salo Schoenberg
The Rabbinical Assembly

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CHANGE AND RESISTANCE

Think of a successful change experience in your congregation – What made it possible?

$$1. \quad \frac{\text{Dissatisfaction} \times \text{Vision} \times \text{First Steps (Plan)}}{\text{Resistance}} = \text{successful change}$$

(Richard Beckhardt Model)

Points:

- a. Shared dissatisfaction is the most important part of equation – demonstrate satisfaction – orchestrate dissatisfaction
 - Also needs security – timing was right
- b. Equation that reads times –if any factor at zero:
 - Pressure does not work
 - Resistant will take over
- c. We all have our own pattern to avoid resistance
 - 1) Anticipate 2) Embrace

2. WHEN YOU ARE READY

- a. Critical mass
- b. Key players – sponsors – Rose Beth Kanter
- c. The time is right – Edgar Schein
- d. Cultural fit – feels right
- e. Read history – James Hopewell – self perception makes a difference – do it by addition
- f. Change agents tend to see the positive results and minimize the risks
- g. Outcome

3. FIRST STEPS

- a. Communicate to whom
- b. Communicate why now

4. CHANGE IN THE RELIGIOUS SYSTEM - Lyle Schaller

- a. Need more allies
- b. Need more time
- c. Planning is NOT a virtue
- d. People more important than the merit of the idea
- e. Perception of reality more important than the facts – it feels right
- f. Based on history – next chapter

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MENTORING AND COACHING: LEADING AT A HIGHER LEVEL

JON BLANCHARD

Definition of Empowerment: Giving people the power to make decisions. Empowerment is the creation of an organizational climate that releases the knowledge, experience and motivation that reside in people.

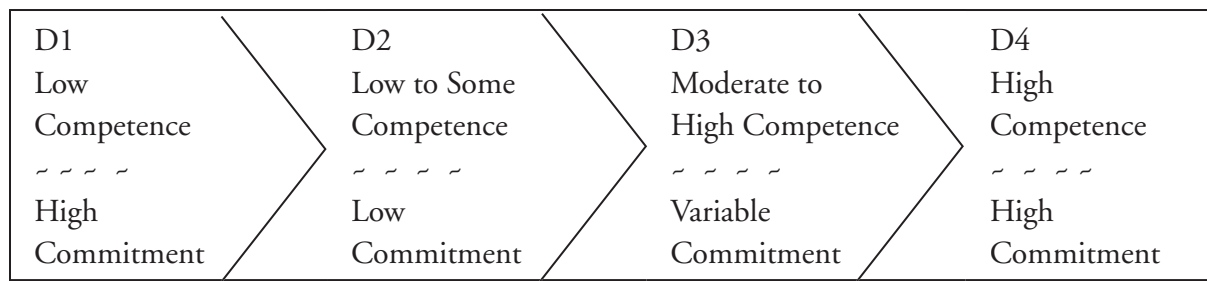
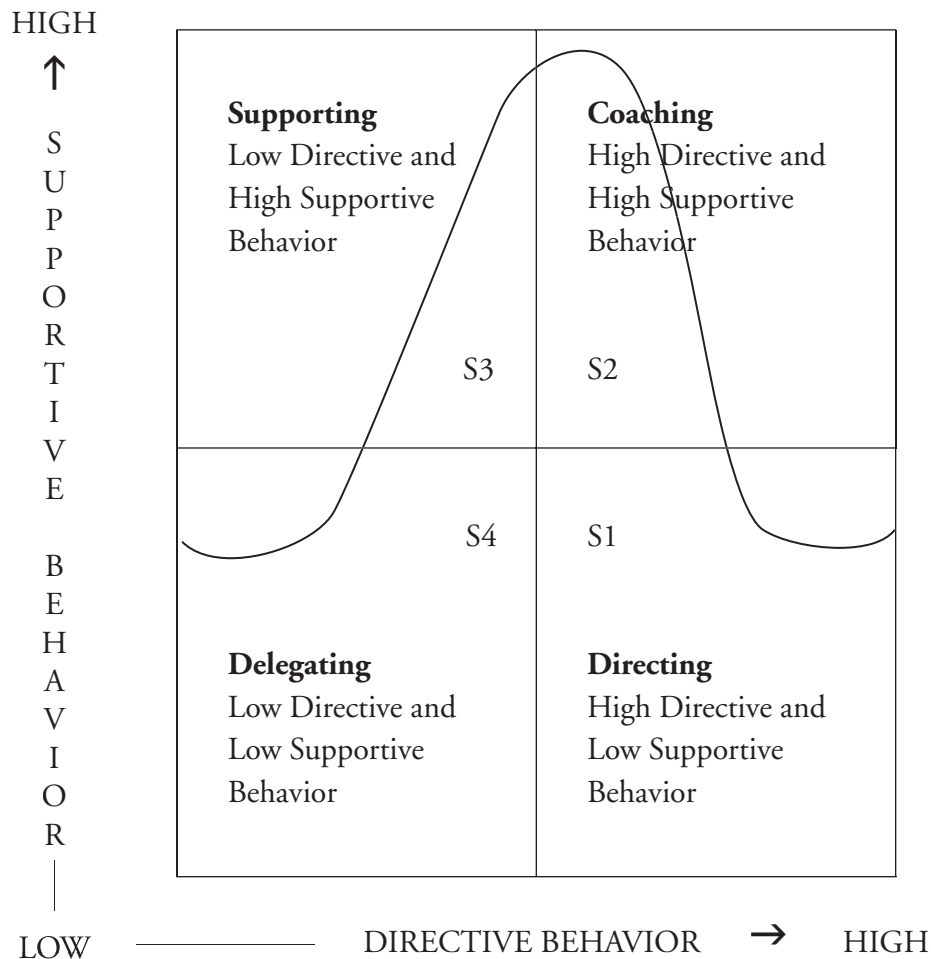
Hierarchical Culture	Empowerment Culture
Planning	Visioning
Command-and-control	Partnering for performance
Monitoring	Self-monitoring
Individual responsiveness	Team responsibility
Pyramid structures	Cross-functional structures
Workflow processes	Projects

Keys to Empowerment:

1. Share information: people with information feel compelled to act responsibly; sharing information builds trust, promotes organizational learning. High performing organizations transfer knowledge
2. Create autonomy through boundaries – more like rubber bands that expand than barbed wire – tell people where they can be autonomous – when declare boundaries also need high doses of training.
3. Replace hierarchy with self-directed individuals. Every employee at Ritz Carlton has a \$2000 discretionary fund – situational leadership.

[illegible]

THE SITUATIONAL LEADERSHIP II MODEL



Matching Leadership Style to Development Level

There are four basic leadership styles in the Situational Leadership II model: directing (S1), coaching (S2), supporting (S3), and delegating (S4). These correspond with the four basic development levels: enthusiastic beginner (D1-low competence, high commitment), disillusioned learner (D2-low to some competence, low commitment), capable but cautious performer (D3-moderate to high competence, variable commitment), and self-reliant achiever (D4-high competence, high commitment).

QUESTIONS	SELF LEADER RESPONSES
1. Do I know what is expected of me at work?	I have clarified what my manager and organization expect of me in my role. I have made it my business to obtain agreed-upon key responsibility areas and corresponding goals.
2. Do I have the materials and equipment I need to do my work right?	I take the initiative to ask for and obtain the materials and equipment I need to do my work right.
3. At work, do I have the opportunity to do what I do best every day?	I find the opportunity to do what I do best every day.
4. In the last seven days, have I received recognition or praise for doing good work?	In the past seven days, I have solicited and received specific feedback regarding my work. I have internally recognized my good efforts, and where needed, elicited acknowledgment for doing good work from those who matter to me.
5. Does my supervisor or someone at work seem to care about me as a person?	I initiate one-on-one meetings with my supervisor to discuss the ongoing direction and support I need to pursue and achieve my goals.
6. Does someone at work encourage my development?	I have fostered a mentoring relationship that encourages my development.
7. At work, do my opinions seem to count?	I have presented my ideas, offered my opinions, and proactively solved problems in a way that communicates my due diligence and allows others to buy into my solutions without worrying about the solution's viability or feeling threatened by my assertiveness.
8. Does the mission or purpose of my company make me feel my job is important?	I have aligned my personal life vision and work-related purpose with the mission and purpose of my organization, making me feel that my job is important and supports my own values and point of view.
9. Are my coworkers committed to doing quality work?	I have mentored and peer-coached my coworkers and have taken personal responsibility to help create a team environment where we are committed to doing quality work for the greater good.
10. Do I have a best friend at work?	I have fostered meaningful relationships and made connections with people at work.
11. In the last six months, has someone at work talked to me about my progress?	On a regular basis, I have taken the initiative to confer with my manager regarding my progress and his or her impressions of how I'm meeting expectations.
12. This last year, have I had opportunities at work to learn and grow?	In the past year, I have created opportunities at work and in my personal life to learn and grow.

[illegible]

FEEDBACK

Specific and measurable. You don't say to somebody, "I want you to improve." You have to be specific about the area that needs improvement and what good performance looks like. Being specific reinforces the old saying, "If you can't measure it, you can't manage it." Therefore, goals have to be specific, observable, and measurable. If somebody says, "But my job can't be measured," offer to eliminate it to see if anything will be missed.

Motivating. The "why" explains how the person's task fits in with overall job performance and the goals and objectives of the unit, division, organization, and customer.

Attainable. It's a false assumption that to motivate people you have to set goals that are attainable.

Relevant. As we stated earlier, we believe in the 80/20 rule. Eighty percent of the performance you want from people comes from the 20 percent of the activities they could get involved in. Therefore, a goal is relevant if it addresses one of the 20 percent activities that make a difference in overall performance.

Trackable and time-bound. As a manager, you want to be able to praise progress or redirect inappropriate behavior. To do that, you must be able to measure or count performance frequently, which means you need to put a record-keeping system in place to track performance.

Being close counts. Wait for the exact right behavior – catch people doing thing approximately right. Praise progress – it is at least a main target. Your praise should be immediate and specific – state your feelings.

If you reprimand. Reaffirm the person. Focus on their behavior without attacking their personality. You want them to think about what they did wrong, not how they were treated.

GUIDELINES FOR GIVING FEEDBACK

1. It is descriptive rather than evaluative, based on observed behavior.

Avoiding evaluative language reduces the need for the individual to respond defensively. Describing behavior minimizes inferences and assumptions made by the giver.

2. It is specific rather than general.

To be told that one is “dominating” will probably not be as useful as to be told that “just now when we were deciding the issue, you did not listen to what others said, and I felt forced to accept your arguments or face attack from you.” Give examples.

3. It takes into account the needs of both the receiver and giver.

Feedback can be destructive when it serves only our own needs and fails to consider the needs of the person on the receiving end.

4. It is put in context.

Is this a big issue or a minor problem? A major achievement or small win? If we give feedback without saying how important it is, the other person’s attention is focused on deciphering the severity of the discussion rather than on listening to you.

5. It is well-timed.

In general, feedback is most useful when given at the earliest opportunity after a particular behavior (depending, of course, on the person’s readiness to hear it, support available from others, etc.). This timing ensures that people remember the event.

6. It is checked to ensure clear communication.

It is helpful to have the receiver rephrase the feedback to see if it corresponds to the sender’s intent.

7. It describes the impact and desired outcome.

Describing the impact on the sender, the group, and/or the organization lets the receiver know why this is an important issue. Describing the desired outcome lets the receiver know what could be different in the future.

8. It is “OWNED” by the giver by using personal pronouns such as “I” and “my.”

Such “I” messages enable the giver to take responsibility for his/her thoughts, feelings, and reactions. In other words, speak for yourself.

9. It includes speaking from the heart.

GUIDELINES FOR RECEIVING FEEDBACK

1. Breathe.

This is simple but effective advice. Our bodies are conditioned to react to stressful situations as though they were physical assaults. Our muscles tense. We start breathing rapidly and shallowly. Taking full, deep breaths forces your body to relax and allows your brain to maintain greater alertness.

2. Listen carefully.

Don't interrupt. Don't discourage the feedback-giver. This person is giving you a gift. If you don't receive feedback, then you will not know what others want/expect from you. Receiving feedback helps us know and grow.

3. Acknowledge the feedback.

Paraphrase the message in your own words to let the person know you have heard and understood what was said.

4. Ask questions for clarity.

You have a right to receive clear feedback. Ask for specific examples ("Can you describe what I do or say that makes me appear aggressive to you?")

5. Acknowledge valid points.

Agree* with what is true. Agree with what is possible. Acknowledge the other person's point of view ("I understand how you might get that impression") and try to understand his or her reaction.

*Agreeing with what is true or possible does not mean you agree to change your behavior. You can agree, for instance, that sometimes you jump too quickly to a conclusion without implying that you will slow down your conclusion-making process. Agreeing with what's true or possible also does not mean agreeing with any value judgments about you. You can agree that your reports have been late without thereby agreeing that you are irresponsible.

6. Take time to sort out what you heard.

You may need time for sorting out or checking with others before responding to the feedback. It is reasonable to ask the feedback-giver for time to think about what was said and how you feel about it. Make a specific appointment for getting back to her or him. Don't use this time as an excuse to avoid the issue.

SARA (COMMON REACTIONS TO FEEDBACK)

Surprise

Anger – don't take any action while feeling angry

Rationalization – likely to make reasonable excuses to put yourself back in control.

Aceptance – now you can look at feedback with some degree of objectivity.

We cannot rush SARA, she moves at her own pace. Prepare yourself for these reactions.

REMEMBER: In receiving feedback, listen beneath the words and don't defend yourself. If you want feedback, you must accept that what others tell you is true from their vantage point. If you start defending your actions, others may stop telling you the truth. End the encounter by expressing your thanks.

GIVING AND RECEIVING FEEDBACK

Feedback is:

- a tool for clearly informing others about your needs, wants or expectations;
- a particular communication tool within a process for managing both expectations and performance over time.

The core of feedback is the Four-Part Feedback Message. The message is constructed as follows:

When You: (What is the specific behavior you want to provide feedback on?)

I Feel: (What are the emotions and feelings this behavior evokes in you?)

Because: (What are the consequences as a result?)

I Want: (What specific behavior would you like the individual to undertake?)

[illegible]

TEAMS

Purpose and values. A high-performing team shares a strong sense of purpose and a common set of values. They have a compelling vision. Purpose and values are the glue that holds the team together and forms the foundation of a high performing team.

Empowerment. Members of a high-performing team are confident in the team's ability to overcome obstacles. They have authority to act and make decisions and choices with clear boundaries. They have the autonomy, opportunity, and ability to experience their personal and collective power.

Relationships and communication. A high-performing team is committed to open communication. People feel they can take risks and share their thoughts, opinions, and feelings without fear. They don't have to love each other but must respect, value, and care about each other. Listening is considered as important as speaking. Differences are truly valued.

Flexibility. High-performing team members are interdependent and realize that all are responsible for team performance, development, and leadership. In a high-performing team it is often difficult to determine who the leader is.

Optimal productivity. High-performing teams generate optimal productivity, reflected in the amount and quality of the work they accomplish. A high-performing team is committed to producing significant results. There is a commitment to high standards and quality.

Recognition and appreciation. A high-performing team experiences continual positive feedback and recognition.

Morale. Morale is the result of all of the above. If the other PERFORM elements are in place, morale is high. Members are enthusiastic about their work; they are proud of their results and feel pride in belonging to the team. The team is confident and optimistic about the future, and trust among members is high. There is a strong team spirit and a sense of unity.

[illegible]

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

MBTI GUIDELINES: MOST WIDELY USED PSYCHOLOGICAL INSTRUMENT IN THE WORLD

1. A tool not a test – seek self understanding. Self understanding – operate within our own sense of personal integrity. What activities do energize us or motivate us?
2. Individuals should have the opportunity to evaluate their own “best fit” type before they share the information with team members – self acceptance. Sense of relief – hear your weakness described as normal – healthy.
3. A person’s psychological type should be regarded as a working hypothesis until it is confirmed by the individual.
4. Everyone uses every preference. We favor, however, one preference over the other on each of the four scales. Ultimately we seek balance – use our other poles.
5. MBTI scores should not be over-interpreted. High scores do not indicate greater skill, magnitude, or use of a preference or excellence. Scores do indicate clarity of choice. Not intelligence or competence but preference. Strong numbers mean clarity.
6. Psychological type can explain some human behavior – not all – we use all eight (8).
7. Psychological type should not be used as an excuse for doing or not doing something. Avoid stereotyping someone on the basis of his or her type. For example, because one person on the team has a preference for Sensing does not mean that that person ought to be assigned all the details.
Not address fears or anxieties – people of all types can be anxious or concerned. It is a theory like the electron to explain reality – no evidence that it really exists.
8. Begun with the archetypes of Carl Jung – Katherine Cook Briggs, Isabel Briggs Myers – put Jung’s typology into an instrument –grew out of WWII work – in use for 50 years. Difficulty in terms because it is a translation from the German.
9. Indicator – *Indicate* a person’s preferences – not a predicator of human behavior – description not lock us in – can’t do that – all types healthy and effective.
10. Forced choice – not a continuum but a dichotomy.
11. Goal – be in your type 51% of the day.
12. Ways to take care of ourselves, e.g. SJ not say no to the should. Reduce stress –we are stressed when we spend too much time on an inferior function – cannot be good at all functions
13. Miscommunication – invitation for empathy. S.J. -not do well with spontaneity.
14. Shadow – darker side – repressed – not evil but potentially good
Openness to explore our shadow side –
Opposite – experience those parts of ourselves least developed –not need to be all things to all people. Mid-life – attraction to develop your least preferred areas - looking inward in their move toward wholeness – part of our desire to grow.

MBTI: EIGHT PREFERENCES

MENTAL FUNCTIONS

Sensing 70%	Intuition	Thinking 50%	Feeling
Internal Mental Function: Ways to Gather Information		Decision Making Scale	
Present Focus	Future focus	Objective	Subjective
Here-and-now	Possibilities –new ideas	Cause and effect	Person-centered values
Specifics – facts	Generalizations	Clarity	Harmony
Details	Patterns	Analytical	Circumstantial
Literal	Figurative	Problem 1 st /People 2 nd	People 1 st /Problem 2 nd
Actual	Theoretical	Critique	Appreciate
5 Senses	6 th Sense	Justice	Mercy
Get upset with new ideas	Builders-Architects	Idealist	Challenge authority
Non-profit – serve human interests			
Love people			

Extraversion 60%	Introversion	Judging 55%	Perceiving
Source of Energy		Outward Orientation	
Externally directed	Internally directed	Closure	Options
Action	Reflection	Structure	Open-ended
Gregarious	Reserved	Ordered	Go-with-the-flow
Expressive	Contained	Decisive	Tentative
Publicly disclosing	Publicly guarded	Scheduled	Flexible
Speak-to-think	Think-to-speak	Control	Adapt
Breadth	Depth	Directive	Non-directive/facilitative
			Not like surprises

FINDING YOUR SPIRITUAL PATH

Preferred Attitude, Judgment, Function or Lifestyle J	Extraversion Perception E P	Introversion I	Sensing S	Intuition N	Thinking T	Feeling F
Primary Arena Will	World/Other Awareness	Ideas/Self	Body	Spirit	Mind	Heart
Preference for Subjective	Action Initiative	Reflection Response	Sensory Reality Details Status Quo	Possibilities Patterns Change	Objective values	values
Prayer Planned	Corporate Unplanned	Private	Sensuous (eyes, ears, nose, hands, mouth)	Intuitive	Cognitive	Affective
Natural Spiritual Path	Action	Reflection	Service	Awareness	Knowledge	Devotion
	Discipline Spontaneity					

[illegible]

LEADERSHIP AND THE POWER OF SELF-KNOWLEDGE

ACTION PLAN

1. Goal		
2. Expected Outcomes: What do I expect to see as a result of achieving this goal? How will others benefit from my achievement of this goal?		
3. The Challenge: What behavioral change will be most difficult for me? What will I need to do differently? (List specific behaviors.) Who will challenge me (positively) in seeking to accomplish this goal? Who will challenge me (negatively) and be a barrier to accomplishing this goal?		
4. Support: Who will be a coach for me and give me honest feedback? On an individual level? On an organizational level?		
5. Assessment: How will I know how I am doing? What assessments are available? Formal/Informal		
Milestone #1	Milestone #2	Milestone #3
Action:	Action:	Action:
Date:	Date:	Date:

INDIVIDUAL ACTION PLAN

I hope you have learned a great deal during this workshop that you will use regularly after you leave here. One of the liabilities of training is that pressures from your job and from other sources will result in your not really applying what you have told yourself you would do at the end of the program. I know from experience that if you don't do something active and explicit with your intentions within three days, you probably won't ever get started.

In order to maximize your success in using what you have learned, I encourage you to work on one (or a very few) "projects" at a time, one step at a time, starting immediately.

Your responses to the following eight statements will allow you to sort through the material you have received and the notes you made and determine what your next steps will be in implementing what you have learned here.

1. Things I want to continue doing:

2. The things I want to stop doing or do less frequently:

3. The things I want to start doing or do more frequently:

4. My first project or focus will be:

5. The first steps I will take for this project are:

6. Others (e.g. mentor, manager, peers) can ensure my success by: (e.g. challenging, encouraging, direct assistance, expertise, partnering, opening doors, etc.)

7. Additional resources I will need to be successful:

8. I will know I have been successful when:

FEEDBACK FORM

1. The three most important lessons you took from this program:

2. What were your personal goals for this program?

3. How well were they met? (Circle one)

Exceeded Expectations

Met Expectations

Did Not Meet Expectations

4. Comments about presentation and presenters.

5. Comments about breaks, pacing, format, etc.

6. What issues would you like to address at future conferences?

7. If you could change one thing about this conference, what would it be?

8. Additional comments (please use other side)

Name:

Address:

Phone #:

email:

*Please return to Rabbi Elliot Salo Schoenberg, The Rabbinical Assembly, 3080 Broadway, New York, NY 10027
eschoenberg@rabbinicalassembly.org*