

Proposal Information

I. Workshop Information

- a. *General Topic* – Leadership Development – The general topic is Leadership Development for participants interested in learning leadership skills that directly relate to reducing turnover of key employees. The intermediate to advanced workshop focuses on the one-on-one relationships with team members teaching key elements of the five proven behavioral skills leaders can learn to reduce employee turnover, especially turnover at key positions. The primary leadership skill learned is the use of Inclusion Behavior to achieve team member engagement on a one-to-one basis which builds on the experiences of the participant in leadership roles. Through individual contributions, partnered exercises, and group discussion the participant will come away with an understanding of how to integrate these leadership skills in their own organization to reduce turnover. Reduced voluntary turnover is generally considered a positive leadership outcome. The participant will also take away an understanding of how to achieve mastery of these skills as well as how to implement them organizationally.
- b. *Workshop Title* – Keeping your best people by learning and implementing key employee engagement leadership skills.
- c. *Workshop Description* – This workshop will, through short lecture and discussion, one-on-one activities, and small group discussion with debriefs, empower leaders in implementing the important leader behaviors with a focus on Inclusion to reduce staff turnover.
- d. *Length of Time* (e.g. 1.5 or 2.0 hours) – 70 minutes

II. Workshop Rationale

- a. *Why is the Inclusion Behavior important for students to learn?*

The overarching theme is that leaders can learn how to implement behaviors shown to improve one-on-one relationships with team members. This improved relationship is key to achieving goal driven positive outcomes such as reduced voluntary turnover.

One behavior is called Inclusion. Inclusion is the conscious leader actions to engage each team member in the process of understanding how a leader's goal is to be achieved. This includes the planning process and creates member buy-in as well as providing a forum for better planning through input. Expectations are set regarding both the leader's and the member's responsibilities, resources, and measurement.

This workshop is designed to inspire and enable leaders to implement this behavior in their own leadership environment to achieve positive organizational goals such as lower turnover.

b. How does Inclusion Behavior relate to leadership development?

An effective leader must be able to engage team members individually by authentic discussions of organizational matters of importance to the leader and to the member. This behavior, and others, strengthens the one-on-one relationship called leader-member exchange; good relationships are associated with greater positive outcomes (e.g. productivity) and fewer negative outcomes (e.g. quitting).

c. Why should students learn about Inclusion Behaviors in order to develop into an effective leader?

Many leadership studies have shown that some qualities of excellent leaders are learned behaviors. Five such behaviors have been identified as leading to the type of team leader to team member relationship associated with highly successful organizational outcomes. The behavior called Inclusion is one of these five. Learning about Inclusion leads naturally to learning about the other four (Respect, Reward, Improvement, and Modeling) which can be addressed in focused workshops as well or learned through study.

III. Learning Objectives

- a. *What do you hope students will learn about Inclusion Behaviors?* My hope would be that they will learn the value of using the Inclusion behaviors and how to implement it in their leadership position to keep key staff engaged and with their organization. This hope applies even if the participant's position is an informal leadership role as this will help develop the individual as well as address the likely situation that they do indeed lead in some way from time-to-time.
- b. *List at least 5 short statements, related to Inclusion Behaviors, indicating what information/concepts/skills students should be able to take away from your workshop.*
- Leadership behaviors are important and learnable
 - Inclusion is a specific type of leader to member behavior and can be learned and implemented in their daily work as a formal or informal leader.
 - How to use the Inclusion behavior in various situations specific to their own role to increase team member engagement that leads to positive outcomes such as reduced staff turnover
 - How to improve on Inclusion behaviors to ensure mastery over time
 - Be able to teach this behavior to others in their organization through formal and informal means to institutionalize this way of engaging team members
- c. *How will the learning objectives be achieved?*
1. Problem-based learning (i.e. students given situations, scenarios, problems and have to solve them with a partner using the learning objective outlined above)
 2. Group learning/activities (i.e. students discussing in small groups their partnered activities to demonstrate and understanding learning objectives)
 3. The workshop will include a combination of limited lecture and discussion followed by three activities to implement the learning. The activities will then be debriefed and discussed. The activities are one-on-one role

play appropriate to their current leadership role, small group analysis of the role play with reporting, and full group discussion. This will be repeated as time allows.

IV. Activities

- a. *Is there any pre-workshop activity required of the participants? There is a pre-workshop activity that would be useful but not required. This activity would be for the participant to consider their answers to (hopefully) thought provoking questions that can help center their mind on the topic to be worked on and also potentially reduce “thinking time” required at the workshop regarding the questions.*
- b. *Will you coordinate an ice breaker activity at the beginning of the workshop to get your audience interacting and engaging with each other? Yes. In keeping with the theme of the workshop, I will ask students to break up into pairs and chat for a few minutes regarding what I will ask them: I will ask them to introduce their partners regarding their partner’s name, their partner’s organization’s name and purpose, their partner’s role in the organization, and what leader now or in history their partner admires most for their leadership and why.*
- c. *Will you implement hands-on activities to demonstrate learning objectives and/or workshop focus/rationale? Yes. The one-on-one role play activities will be based on planning to achieve an actual organizational goal to reduce key employee turnover. Each participant will alternately be assigned to be the leader of the pair and arrive at how the team member – the other of the pair - will accomplish the goal.*
- d. *Will you need additional materials/resources to carry out your planned activities?*

I would like to be able to use PowerPoint slides, so hook-up to a projector would be necessary. A flip chart and four colors of markers would be needed.

e. *Who will be presenting and what is there CV?*

I am the presenter, David Smith, Ph.D. I am the (unpaid) Director of Research for Oahu Adventures Foundation, Inc. (oafound.org). We develop leadership development programs for small group workshops. The workshops are based on my proprietary research encompassed in Five Star Leadership® behavior-based leadership principles. I developed these principles during my dissertation research for my 2016 completion of my Ph.D. in Organizational Leadership.

I am an accomplished presenter in my “real” career as a financial professional. I have spent 38 years presenting financial concepts in large and small workshops around the country.

V. **Presentation Materials, Instruction Materials, and other Handouts**

- a. *Do you have a sample workshop announcement that describes the workshop’s benefits to participants?* Yes. The announcement describes the topic and the benefits of attending. See attached announcement.
- b. *What materials, if any, need to be sent to the participant prior to the workshop?* If possible, but not required, a pre-workshop set of questions could be sent to the participants. The questions are designed to provide discussion material appropriate to the topic and their work role. There is no need for them to return their answers prior, but bringing their answers written out can save some “thinking time” that can be used for discussion instead. See attached question list.
- c. *What materials will you use to present?* I will have a PowerPoint that I will use to outline key points during the short presentation. The PowerPoint will also serve to remind participants of what the activity is they are working on and the goal of the activity. See attached PowerPoint.

- d. What handouts will you provide and what is their use? I will provide worksheets with key questions to be answered by the participant to record takeaways from the activities. See attached worksheets.*
- e. What reference material or sources will you provide for the attendees to refer to after the workshop and what is their purpose? I will provide worksheets for use by the participant at their work to help in mastery of the use of the Inclusion behavior in their work role. I will also provide a reference list so those participants who want to learn more about this subject can do so on their own time. All of the material and reference lists can be made available via an email after the workshop.*

VI. Instructional Support and Assistance

- f. What type of AV support will you need for your workshop (i.e. laptop, projector, sound system, DVD/VHS player, overhead projector, etc.)? I can bring my own laptop but would need a hook-up to a projector and screen or large monitor. I can rent the projector if needed.*
- g. Will you need copies of handouts, presentations and/or other materials? No, I can provide these as long as I know how many attendees.*
- h. Will you need special room arrangements (i.e. chairs, tables, easels, etc.) for your workshop?*
- I anticipate spending most of the time in small groups either seated or standing, so an arrangement of tables and chairs that allows freely moving the chairs into pairs and small groups would be useful. Tables are always nice because you need a place for your stuff.*

Workshop Announcement

Keeping your best people by learning and implementing key employee engagement leadership skills

This workshop is for managers and leaders in organization who want to reduce key employee turnover. Participants will learn specific leadership skills focused on proven behaviors that reduce turnover of key staff members. Through explanation of these skills and active group participation leading to discussions, the participant will learn how to apply these skills to their own organization today.

Pre-Workshop Questions

A. Your organization

What does your organization do? Describe your organization in general terms of what it does, who it does it with, a bit of history.

What is your role? What is your title? Where do you fit in the organization?

What is your organization's goals regarding turnover of key employees? Do you have a problem that needs solving regarding employee turnover?

Who currently or in history is a leader you greatly admire and why?

PowerPoint Presentation (unformatted)

Workshop Purpose

- Leadership is not a team sport – it is one-on-one
- This relationship is key to getting positive results
- Leaders can behave in ways that create good and bad relationships
- This program teaches you how to implement specific leadership skills to create great working relationships
- Great relationships reduce turnover in key positions

1

Partner Activity

- Partner up... Each of you write down a real organizational goal of yours
- For the first five minutes Partner A will be the leader with their goal and Partner B will be the person the leader needs "to include" to achieve that goal. The leader and member discuss achieving that goal.
- Then take three minutes to write down together how the leader used "Inclusion Behavior" and the results of the discussion.
- Then Switch... Partner B is the leader... five minutes, three minutes.

4

Warm up!

- Partner up...
- And come back with the answers to four questions:
 - What is your partner's name?
 - Who do they work for and what does this organization do?
 - What role does your partner have in their organization?
 - Who do they admire as a leader and why?

2

Small Group Follow-up

- Three pairs should "group up" to discuss how each of you as leaders used Inclusion Behavior and how each of you reacted to this behavior as the team member being included...
- What you are trying to discover in your group is how approaches were similar or different and how feelings were similar or different.

5

Inclusion Behavior to Engage Staff

- Inclusion embodies the behaviors of consulting with members about important task issues and delegating decisions and effort regarding the task.
- Let's discuss what this means in action regarding turnover: examples, reasoning, outcomes

3

Workshop Discussion

- What was observed?
- What did this mean to you?
- What does this mean for you in your work role?
- Implementation for Mastery

6

Mastery Worksheet for the Inclusion Behavior

Describe the Leader goal:

Who does this goal affect? How does it affect them?

What do you think you could get out of having an inclusive discussion with each?

For those you want to include, how are you going to do it?

Now that you did it, what did you do?

What was the outcome of each inclusive discussion? Was this helpful?

References:

1. For a good understanding read "Leadership in Organizations, Eighth Edition" by Gary Yukl, 2013. Pearson, Boston, MA. Chapters 9 and 10.
2. For an example of how social scientists look at these behaviors in leadership contexts, see O'Donnell, M., Yukl, G., & Taber, T. (2012). Leader behavior and LMX: a constructive replication. *Journal of Managerial Psychology*, 27(2), 143-154.
doi:10.1108/02683941211199545
3. To understand why it can be important to have a high quality relationship with team members, see Podsakoff, N. P., Blume, B. D., Whiting, S. W., & Podsakoff, P. M. (2009). Individual- and organizational-level consequences of organizational citizenship behaviors: A meta-analysis. *Journal of Applied Psychology*, 94(1), 122-141. doi: 10.1037/a0013079
4. Articles regarding this subject and other related topics can be found at: <http://www.lmxpro.com/index.php/articles>