Leadership & Management

A Winning Combination
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Introduction

People today are seeking to understand -- and many people are writing about -- the styles, concept and practices of leadership and management. There are a great many reasons for the popularity of the topic, including that organizations are faced with changes like never before. The concept of leadership is relevant to any aspect of ensuring effectiveness in organizations and in managing change.

As a manager, you will envisage this journey as a set of tasks to be undertaken to ensure the trip is a success; as a leader you will understand that tasks need to be undertaken, but your skills will enable you to provide a clear picture of the destination and its benefits so that others will want to contribute by undertaking those tasks to ensure the trip is a success.

There may not be a clear path when deciding how to lead or manage for the day or project or group. This paper is a snapshot for exploration and opportunity. Roadblocks are simply opportunities to seek new ways to move ahead, detours are opportunities to plan, strategize and explore different routes towards your destination, and every path will provide a learning experience that will enrich you as you travel onward towards your goal.

Our goal is to provide enough information and tools that will enable you to start the journey and explore these questions and find the answers that will assist you on becoming and continuing to be an effect leader while ensuring productive management.

This project provides key areas that will help you assess yourself in your management and leadership styles and systems and continue to reflect and reassess your strengths and identify any weak areas. The Leadership and Management Took Kit provides a desk-top reference with detailed descriptions of management and leadership styles as well as your quick assessment tools.
What are a Manager and Leader and what is Your Style?

**Traits and Values of a Manager**

The Webster dictionary describes a manager as ‘someone who handles or directs with a degree of skill’.

Management comprises planning, organizing, staffing, leading or directing, facilitating and controlling or manipulating an organization or effort for the purpose of accomplishing a goal.

Managers are often thought of as the person who will do whatever needs to be done to keep things afloat. This thought is not necessarily what makes a manager successful. A manager needs to master certain skills in both management and leadership to succeed.

At the core, a manager has two responsibilities; overseeing day-to-day activities and leading the team or organization to the next level.

The first thing to understand is that, come what may, daily activities can’t be ignored. Even if the organization is striving to achieve a strategic goal, daily activities must continue for an organization to function effectively.

As a manager, you need to cultivate habits so that they become routine and embedded in how you operate. Unless you master the daily grind, managers can quickly find themselves falling behind in their job.

Here are some examples of what makes a successful manager.

**Efficiency orientation** - the ability to set realistic yet challenging goals and deadlines, specific action plans, finding ways to overcome obstacles, efficiently organizes workload, and emphasizing performance when talking to others;

**Concern with Impact** - understanding the need for power and concern for power symbols, with behaviour such as acting assertively, attempt to influence others, seeking high status position, and express concern for the reputation of the organizations products and services;

**Pro-activity** - being a step ahead and initiating action rather than waiting for something to happen and accepting responsibility for success as well as failure;

**Self-confidence** - ability to take decisive action in a firm manner with appropriate poise, bearing and gestures;

**Oral presentation skills** - ability to use aids and behaviours to communicate assertively without impacting adversely on the relationship;

**Conceptualization** - identify patterns or relationships and the ability to convey the meanings and develop solutions and new insights to the problems;

**Diagnostic use of concepts** - ability to analyze situations, distinguish between relevant and irrelevant and detect deviations from plans;

**Use of socialized power** - develop networks and gain cooperation from others, resolve conflicts, able to influence others;
Managing Group Process – Lead the Team - manages processes to build your individuals and the team spirit.

Leading the team will mean taking things with a grain of salt. It might feel like you are being weighed down by the workload but you can’t just wish it away. Learn to be judicious and willing to take calculated risks. You should not differentiate workers on personal levels but must be aware of the abilities of each one. Ask about problems being faced by workers, don’t be impatient and lose your temper, ask how you can help them finish their tasks, etc. Immediately solving problems and disputes not only saves the day for you but wins confidence from everyone.

Developing analytical abilities will help you to both envision plans and put them into concrete steps. Draw from past experiences, wherever necessary. Don’t hesitate to ask questions and accept suggestions. Generate ideas by brainstorming with colleagues. Your main goal is organizational growth and with it, your own personal growth while handling the daily organizational activities. You should dream big, but also set realistic goals based on assessments of scalability, need and cost factors etc.

To summarize, a good manager:

-picker

- Is skilful in problem-solving and decision-making – evaluating the needs of the company in their order of importance and carries out tasks accordingly;
- Does not let irrelevant matters bog him down;
- Is rich in human qualities and understanding of human nature;
- Is confident, buoyant, enthusiastic, and not easily ruffled – flexible to ideas and ways.

Traits and Values of a Leader

As we reflect upon the phenomena of leadership, we travel down a path that is rich with discussion, interest, complexity, and many different interpretations.

We come to know that leaders have been an integral part of our societies since time immemorial ranging from the historical ‘warrior’ model of leadership of Attila the Hun or Napoleon Bonaparte to more current famous inspirational model leaders, such as Gandhi, Martin Luther King, Jr., or Mother Teresa. We also understand that being a leader is not only destined for these famous leaders or those persons in formalized authority roles; rather, leaders are called to action in all aspects of our society at different times with different individuals.

In each of our respective places in life and/or in the daily work we do, we encounter leaders both formal and informal, who epitomize the true spirit of leadership. So what are these traits, values and approaches that these individuals possess that set them apart as true leaders?

We invite you to join us on our journey to become more effective leaders. We believe that we can start to do so by developing a clearer understanding of leadership through identifying some
common themes that describe leadership traits, values and approaches. We have arrived at these themes by reviewing the abundant information available and extracting some characteristics that tend to be universal. Notwithstanding, leadership seems to be one of those qualities that you know when you see it, yet it is sometimes difficult to describe.

Five key themes on Leadership Traits, Values and Approaches are as follows:

Leaders have Vision, Values and Purpose
A leader has a vivid picture of what needs to be achieved (Vision), the principles necessary to get there (Values), and is clear about why it is important to achieve the vision (Purpose).

- **Vision**: Leaders inspire and excite others to join the team to move forward towards the vision. They are able to bring the vision alive for people through clear and enthusiastic communication that causes followers to ‘buy into it’. He or she acts upon this vision purposefully and deliberately and demonstrates strong commitment – leaders set out to influence the actions, beliefs and feelings of others on their path to a vision.
- **Values**: Leaders are able to gain trust in the values by living true to principles or values they themselves embrace. In other words leaders demonstrate and live with integrity. Truthful and respectful behaviour, predictable reactions, and well-controlled emotions are some examples of integrity. Leaders are honest! Such an individual can be trusted because he or she never veers from inner values, even when it might be expeditious to do so. A leader who is centered in integrity is also more approachable by others.
- **Purpose**: Leaders embrace their purpose and take action to achieve this purpose. Leaders also take risks in an assertive, non-aggressive fashion towards their purpose. The most rewarding and engaging purposes in life’s work are those that make a difference (not just a profit!).

Leaders are Responsible for their Choices
- A good leader must have the discipline to work toward his or her vision single-mindedly, as well as to direct his or her actions and those of the team toward the goal.
- Leaders recognize what can be done, what needs to be done, and take charge of doing it. Action is the mark of a leader. A leader does not suffer “analysis paralysis” but is always doing something in pursuit of the vision, inspiring others to do the same.
- Leaders are dedicated and do whatever it takes to complete the next step toward the vision – in doing so; leaders take responsibility for setting the example.
- Leaders take responsibility for failures and learn from mistakes.

Leaders are Authentic
- Leaders demonstrate many traits such as: courage, humour, creativity, transparency, intelligence, confidence and optimism. However, all of these traits must be truly a part of oneself - leaders must be authentic.
- Leaders are self-aware and look deep inside of them in order to be fully in touch with who they are.
- Being authentic is an important and necessary aspect of influencing others.
Leaders have Passion and Commitment
- Through passion and commitment, leaders inspire others and are able to increase engagement in the work environment.
- Leaders foster environments of openness and transparency with their high levels of commitment and excitement about their purpose or vision.
- Leaders know how to use their humour to energize others and promote camaraderie.
- Leaders help others discover purpose in our work or lives, or in other words – leaders know how to bring spirit and meaning to whatever the cause is through their connection to passion.

Leaders mobilise and energize others
- “Treat people as if they were what they ought to be and you help them become what they are capable of being.” (Goethe).
- Leaders discover where others can flourish and succeed, and provide the coaching needed to utilize skills and achieve success.
- Leaders help people grow by building on strengths, clarifying roles and expectations and addressing poor performance.

You now have a bit of information about leaders; what some of the traits and values a leader may have and how to utilize these qualities. Let’s use the following assessment tool to determine what your leadership style is with detailed descriptions of that style following the test.
Leadership Styles

What is My Leadership Style?

1. Are you an excellent listener, able to put yourself in another’s shoes?
   A: Occasionally B: Sometimes C: Almost never me D: Almost always E: Some say yes, some no
2. Are you known for being relentless at pursuing initiatives?
   A: Some say yes, some no B: Occasionally C: Almost never me D: Almost always E: Some say yes, some no
3. Do you have a reputation for breaking new ground, and do you like to do it without breaking glass?
   A: Almost never me B: Occasionally C: Some say yes, some no D: Sometimes E: Almost always
4. Of the last ten people to come into your office, how many left with a greater understanding of some pivotal issues or the root cause of a problem?
   C: Almost never me A: Occasionally B: Some say yes, some no E: Sometimes D: Almost always
5. Is being fair really important to you, to the extent that you will solicit input from a wide variety of people to ensure everyone’s voice is heard?
   C: Almost never me E: Occasionally A: Some say yes, some no D: Sometimes B: Almost always
6. Do you tend to rally for a cause at work?
   A: Almost never me B: Occasionally C: Some say yes, some no D: Sometimes E: Almost always
7. Are you known for bucking the trends and doing what is best to make a situation work?
   A: Almost never me B: Occasionally C: Some say yes, some no D: Sometimes E: Almost always
8. Are you known as a leader that will ensure rewards and punishments based on communicated outcomes?
   A: Almost never me B: Occasionally E: Some say yes, some no D: Sometimes C: Almost always
9. Do you tend to encourage others to become leaders; being honest and open and providing praise?
   C: Almost never me D: Occasionally E: Some say yes, some no B: Sometimes A: Almost always

If you answered mostly:

A – you are a Charismatic or Transformational leader. These leaders inspire trust, faith and belief in them; you have a remarkable ability to distil complex ideas into simple messages; you are a great optimist. You are a dominate force and are self confident. You have a strong sense of self values and morals and have a strong desire to influence others
B – you are a Participatory leader. These leaders allow every member to have equal opportunity to grow and become leaders, encouraging all members to be fully involved in group affairs by keeping them informed. You have a strong sense of being open and honest and to contribute to your teams pride and loyalty by defending and acknowledging them.
C – you are a Transactional leader. This leader is interested in looking out for oneself, having exchange benefits with their subordinates and clarifies a sense of duty with rewards and punishments to reach goals. Transactional leaders are one of the more common leader types.
D – you are a Humble/ Quiet or Servant leader. This leader is based on respect for others. You show selflessness and a strong commitment to achieve results and bring out the best in your subordinates. You are a paradoxical blend of fierce will and personal humility. You are stubborn and ruthless, yet humble. You are ambitious for your company and rarely let your ego get in the way.
E - you are a Situational leader. This leader can adopt different leadership styles depending on the situation. You analyze the needs of the current situation and adopt the best leadership style to make it work. You rely on effectiveness in four communication components; communicating expectations, listening, delegating, and providing feedback.
Charismatic Leadership

“a certain quality of an individual personality, by virtue of which he is set apart from ordinary men and treated as endowed with supernatural, superhuman, or at least specifically exceptional powers or qualities.”

Max Weber

Traits of Charismatic People

- A remarkable ability to distil complex ideas into simple messages
- They communicate by using symbols, analogies, metaphors and stories
- They relish risk and feel empty without it
- They are great optimists
- They are rebels who fight convention
- They may seem idiosyncratic
- These leaders inspire trust, faith and belief in them. Of course, none of this is a guarantee that the mission will be correct, ethical or successful

Four Phrases to Define Charismatic Leadership

1. Dominant
2. Strong desire to influence others
3. Self-confident
4. Strong sense of one’s own moral values

Five Behavioural Attributes of Charismatic Leaders

1. Vision and Articulation
2. Sensitivity to the environment
3. Sensitivity to member needs
4. Personal risk taking
5. Performing unconventional behaviour

Steps in Charismatic Leadership Approaches

1. Continual assessment of the environment and formulating a vision
2. Communication of vision, using motivational and persuasive arguments
3. Building trust and commitment. Subordinates must desire and support the goal of the leader and this is likely accomplished by more than coercion: rather the leader builds trust in the within the leader and the viability of the goals: this is likely to be done through personal risk taking, unconventional expertise and self-sacrifice.
4. Achieving the vision. Using role modeling, empowerment and unconventional tactics.

Strengths of Charismatic Leadership

- Results in relatively strong, unchallenged levels of obedience
- Useful in difficult times or circumstances, such as urgent organizational turnaround. Compare. Crisis Management
Effective. If the charismatic leader’s vision is right, this leadership style can be extremely effective.

Rhetorical ability. Compare: Framing

Energetic, inner clarity, visionary, unconventional and exemplary

Limitations of Charismatic Leadership

Results in relatively strong, unchallenged levels of obedience. Tendency of gathering weak “yes-men”. Poor delegation.

People possessing these skills and attributes are relatively rare

Tendency to narcissism. Loosing reality. Insensitive to others. Compare: Seven Sign of Ethical Collapse

Lack of accountability. Freedom from inner (moral) conflicts. The values of charismatic leaders are essential. If such leaders are well intentioned towards others, they can elevate and transform an entire company. But if they are selfish or poor, they can create cults and effectively rape the minds of the followers.

Unpredictable. Potentially dangerous.

Conclusion

Charismatic and transformational leaders may have similar qualities. The main difference is their basic focus. Transformational leaders have a basic focus of transforming the organization and possibly their followers whereas charismatic leaders may not want to change anything.

Participatory Leadership

The definition of participate is to take or have a part; share with others; partake. Participatory leadership fosters program innovation. As well, not believing in dictatorship allows every member to have equal opportunity to grow and become leaders thereby encouraging all members to be fully involved in group affairs by keeping them informed. Groups are willing to have tasks delegated and have open discussions.

Not Rocket Science – Frank Daly

You get them with you by:

Involving them in decision making

Investing in them

Challenging them to greatness

Giving them freedom to take risk/make mistakes

Being open and honest with them

Defending them/acknowledging them

Appealing to their pride and loyalty

Giving them a vision they can relate to

Showing passion and being passionate
Participatory or collaborative leadership, according to Zoe van Zwanenburg, Chief Executive of the Scottish Leadership Foundation, was “the only way” to tackle the challenges facing the public service. She also said that greater levels of cooperation and employee participation can act as crucial enablers for public servants to re-design processes and systems, and ultimately deliver “performance that is exciting, engaging and really makes a difference”.¹

Peter McLoone, General Secretary of IMPACT, said “real participatory leadership requires organizations to value the individual and their development, must engender trust and confidence in all relationships, including working relationships.”⁶

**Situational Leadership**

Situational Leadership Theory (SLT), as demonstrated through the SLII model developed by Hersey and Blanchard (Hersey et al., 2001), “argues that no one style of leadership pertains to all given workplace situations. Rather, scholars have asserted that effective leaders change their leadership styles to fit the situation. Thus, a leader’s style changes with both the situations they are faced with and the environment that they are in. The theory suggests that not only can leaders alter their leadership styles but that they should depending on the situation at hand” (Wikipedia, 2009). Situational leadership theory (SLT) focuses on the interaction of the leader’s behaviour and follower readiness and then measures it to determine leader effectiveness.

Hersey and Blanchard’s (Hersey et al., 2001) SL model has characterized situational leadership in terms of the amount of guidance or direction and “socio-emotional” (Avery, G. C., 2002) support provided (described as high or low supporting below). They categorized situational leadership styles into four categories, which they named S1 to S4:

- **S1**: Guiding/Directing/Telling Leaders outline roles and responsibilities of the follower while supervising closely. The leader makes decisions and announces the outcome, which provides for one-way communication (high directing; low supporting).
- **S2**: Persuading/Coaching/Selling Leaders maintains defining the role and responsibilities, however the leader pursues perceptions and suggestions from the follower. Control over decisions remains with the leader, yet two-way communication is apparent (high directing; high supporting).
- **S3**: Encouraging/Supporting/Participating Leaders allow followers/employees to make decisions regarding task allocation and processes. The leader facilitates and is integrative to the decision-making; yet final decision is controlled by the follower (low directing; high supporting).
- **S4**: Observing/Monitoring/Delegating Leaders are still involved in decision making and problem-solving, however the follower/employee has full control over the outcome and the involvement of the leader (low directing; low supporting).

This model highly suggests that no one style is preferable – flexibility to adapt to situational change is important. However, each leader has a tendency to have a style that is intrinsic and natural, so recognizing this style and adapting is optimal.

The situational leadership model continues to investigate the follower, as the appropriate leadership style used depends upon this. Hersey and Blanchard extended their model (Hersey et
al., 2001) to include the Development Level of the follower stating that the competence and commitment of the followers/employees will influence the style chosen. Follower/employee development has been categorized into four segments (D1 to D4):

- **D1: Low Competence, High Commitment** – These followers generally lack the skills necessary to complete the task or responsibilities, yet they are enthusiastic (want to learn and willing to take direction).
- **D2: Some Competence, Low Commitment** – The followers/employees will need some guidance as they do not have all the skills necessary to complete the task due to lack of experience.
- **D3: High Competence, Variable Commitment** – The followers/employees may lack the motivation or confidence to complete the responsibility effectively or efficiently, however they have the skills and experience necessary to complete the task.
- **D4: High Competence, High Commitment** – The followers/employees have the knowledge, experience, confidence, and self-efficacy to complete the task well (maybe more so than the leader).

Follower/Employee development levels are also situational; “a person might be generally skilled, confident and motivated in their job, but would still drop into Level D1 when faced, say, with a task requiring skills they don’t possess”7. The development level has been altered to reflect the “performance curve” (Blanchard et al., 1985) through the term performance readiness level8. “It is based on the Development levels and adapted from Hersey’s Situational Selling”7 9.

**Transformational Leadership**

Transformational leaders are defined as a leadership style that “creates valuable and positive change in the followers. A transformational leader focuses on "transforming" others to help each other, to look out for each other, to be encouraging and harmonious, and to look out for the organization as a whole. In this leadership, the leader enhances the motivation, morale and performance of his follower group” 7. Transformational leaders are charismatic, self-aware, creative, and insightful. As stated by Tatum, B. C. et al, they “create a vision of the future and inspire their followers to question the status quo, see beyond the here and now, and pursue a new purpose”.

During decision-making, transformational leaders try to integrate the abundance of information they have in order to “form their vision and galvanize their followers”. They do this by adopting a comprehensive decision making style which allows for followers to have input that is valued. They see all perspectives and alternatives before making the decision and will be mindful to integrate the opinions or suggestions of others into the mix.

Transformational leaders are concerned with social justice versus structural justice. This is due to their caring nature; they are looking out for the employee’s well being and needs while maintaining a responsive and open nature. Utilizing social justice as their main approach, transformational leaders behave in ways that exhibit “faith [in] and respect for people, treating each employee is an individual, finding innovative ways to solve problems, focusing on values and ethics, and communicating a vision of future” (Tatum, B.C. et al., 2003). These behaviours relieve stress for employees as they diminish role ambiguity, which is considered a stressor in the workplace.
Sarros. J. S. and Santora, J. C. studied executives in 500 Australian companies (of which 181 agreed to be surveyed, and/or interviewed) through utilizing the multifactor leadership questionnaire (MLQ), (Bass, 1990). This particular study articulated that there are four types of transformational leadership used by top executives. These four types are individualized consideration, inspirational motivation, intellectual stimulation, and idealized influence.

**Individualized consideration** is a fundamental transformational leadership behaviour that treats individuals as important contributors to the workplace by showing consideration for their workers needs. Transformational leaders are prepared to encourage and coach the development of appropriate work place behaviour if necessary.

**Inspirational motivation** raises the consciousness of workers about the organization’s mission and vision. By creating awareness around the mission and vision, transformational leaders encourage others to understand and commit to the vision. Inspirational motivation addresses the element of organizational existence versus the personality of the leader.

Utilizing **intellectual stimulation** means encouraging creativity and accepting challenge(s) as part of the job. Transformational leaders maintain a calm demeanour while solving problems rationally. They cultivate the same skills in their workers by working through difficulties with the staff in a calm, calculated fashion. They also use problem-solving techniques to reach collective decisions that reflect a mutual consensus between leaders and employees. This approach reflects greatly the coaching and morale building strengths of individualized consideration. “Both leadership approaches build character as well as organizational skills through caring leadership that coach and challenge” (Sarros, J.S., 2001).

Transformational leaders use **idealized influence** to encourage followers to use their leaders as role models. They use this approach to inspire values that provide meaning for and instil a sense of purpose in people or followers. This behaviour is inspirational in that it hones on attitudes and feelings about the important things in life, such as social, personal and fighting qualities (Sarros, J. C., 2001).

Transformational leadership is often associated with charismatic leadership because they project their self-confidence onto others by displaying confidence on a follower’s willingness to make self-sacrifices, as well as a follower’s ability to accomplish exceptional goals. This is a powerful motivating force of idealized influence and role modelling behaviour. It is stated that leaders who demonstrate confidence in their workers can achieve great things. The practice of idealized influence illustrates a positive sense of self-determination; in emotional control and conviction that transforms their followers through communication, role modelling, and encouragement. These are appropriate strategies for achieving the mission and goals of the company.

According to Popper, M. And Zakkai, E. (1994), transformational leadership is predominant in “situations where the basic level of anxiety is not high and attention is given to the developmental needs of the led” (Table 1. Transactional, Charismatic, and Transformational Leadership and the Conditions Conductive to their Predominance).
Liberty, equality, peace, and justice are the values and ideals in which transformational leaders appeal. Followers have a raised consciousness due to this leadership approach (Sarros, J.S. 2001).

**Transactional Leadership**

Transactional leadership is defined as focused “more on a series of "transactions". This person is interested in looking out for oneself, having exchange benefits with their subordinates, and clarify a sense of duty with rewards and punishments to reach goals” (Wikipedia, 2009). They are considered to be “efficient managers who can focus on the task at hand, communicate clear expectations to their subordinates, solve immediate problems, and reward performance” (Tatum, B. C., 2003).

Transactional leaders can also be known as “laissez-faire” leaders as the leadership styles have similar traits regarding decision-making and organizational justice. Laissez-faire leaders have a tendency to lead by allowing people to manage them, which possibly flows into being managed “by the book”. This leadership style also speaks to passive avoidance and management by exception. Research has been contradictory in this sense as laissez-faire leaders are also considered “non-leaders” as the major characteristic of laissez-faire leaders is their “incapacity to get involved” (Sarros, J. C., 2001). For the purposes of this overview, laissez-faire leadership characteristics and behaviours will not be further discussed outside of the decision making and organizational justice categories.

Transactional leaders tend to focus on task at hand with regard to decision-making. They also try to solve or avoid immediate problems. The transactional leader uses a less comprehensive decision-making style than that of the transformational leader. This autocratic approach to decision making restricts the amount of information that is processed.

As compared to the transformational leader, transactional leaders focus more so on structural justice than social justice. This provides for an efficient manager who ‘focuses on clear communication, solving immediate problems, and rewarding subordinates, as well as on creating the policies and support elements that foster structural justice’ (Tatum, B. C., 2003). However, the transactional leader lacks self-awareness and consistently pursues a “cost-benefit, economic exchange with follower’s” so that “material and psychological needs are satisfied in return with expected work performance” (Tatum, B.C., 2003).

In reference to transactional leadership, there are two factors consisting: contingent reward and management by exception. Contingent reward is a strategy that does achieve results; followers or employees appreciate tangible, material rewards for their efforts. This transactional leadership strategy promotes compliance by appealing to the wants and needs of the individual employee. To get the job done, these leaders give direction to the employees; “this is a positive reciprocal relationship between leaders and followers who exchange ideas and skills in the pursuit of company goals and individual needs” (Sarros, J. S., 2001). Although there are many positive outcomes from the transactional leadership style, negatives exist as well. Transactional leaders view employee performance in financial terms, neglecting cultural contexts within organizations that are dependent upon integration of perspectives, suggestions, etc. to reach “synergistic
outcomes” (Sarros, J. S., 2001), which creates meaningful outcomes. Direction setting, reciprocity, confidence in the team, and material rewards for performance are key indicators of this approach to transactional leadership.

Management by exception is the second of the two transactional leadership approaches. This approach allows leaders to have implicit trust in their workers to complete the task/job to a satisfactory level while avoiding conflict; expectations are no greater than satisfactory. With this approach, a sense of adventure is nil, which brings about monotonous employees/followers. Overall, this approach entails poor communication, lack of confidence, trust in workers, and maintenance of the status quo (Sarros, J. C., 2001).

Popper, M. And Zakkai, E. (1994) state that transactional leadership is commonly found in situations that are routine; “basic levels of anxiety are not high and there is no acute sense of major change or impending crisis”. 11

**Humble or Quiet Leader**

The actions of a leader speak louder than his or her words. People are motivated when you give them credit rather than take it yourself. The approach of quiet leaders is the antithesis of the classic charismatic and often transformational leaders in that they base their success not on ego and force of character but on their thoughts and actions. Although they are strongly task-focused, they are neither bullies nor unnecessarily unkind and may persuade people through rational argument and a form of benevolent Transactional leadership.

Being quiet is not the secret of the universe and leaders still need to see the way forwards. Their job can be harder when they are faced with people of a more external character. For people who are accustomed to an extraverted charismatic style, a quiet style can be very confusing. Successful quiet leaders often play the values card to persuade others, showing selfishness and lack of emotional control as being unworthy characteristics. Again this style of leadership can lead teams to fall into patterns of behaviour where peace and harmony are prized over any form of challenge or conflict. Quiet leaders love the lack of attention as they value subtlety.

The following are distinctive traits of quiet leaders:

**Influence rather than lead** – most quiet leaders are relational rather than authoritative. They believe in persuasion techniques rather than command and control. They tend to chose the less travelled and less recognized path of leading by influence, thereby sacrificing prominence for impact with a dose of personal touch thrown in.

**Question and give suggestions rather than dishing out orders** – by using this approach, they come across as being more influential because the very act of question provides room for others for introspective self-reflection, which is critical for change to happen. Questioning has been considered to be one of the more powerful and effective persuasive tools available.
**High level of flexibility** – do not dominate – they tend to encourage and advise and support their mentees. They are less directive and more nurturing. It adopts a “bottoms-up” approach, as they tend to influence the people on the ground first

**Influence small groups** – quiet leaders work resiliently at influencing people, group by group using remarkable enthusiasm and presentation flair in smaller groups gaining a human touch to the interaction

**Excellent listeners** – are often useful as listening ears for members who want a listening ear – geared toward passive rather than assertive

What are the characteristics of this style?

- Objectively assess their strengths and abilities.
- Openness – knowing their own weakness
- Possess humility – less likely to be corrupted by power, fraud, etc.
- More willing to serve others
- More willing to take advice that can keep them out of troublesome issues

What lessons can be learned from this style of leadership:

- Create a compelling mission that ignites passion and commitment.
- Communicate a vision that transforms people to another level.
- Create a culture that is driven by values that are platforms for a call to action not platitudes.
- Challenge assumptions
- Take courageous risks
- Lead by example and integrity
- Inspire others to lead
- Be humble
- Give credit to others
- Follow through
- Pass the torch to successors
## Your Management and Leadership Styles

Assess your leadership skills on the following 10 statements using a 5-point scale.

1 = Not like you.........................................5 = Very much like you

<table>
<thead>
<tr>
<th>Statement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I have a clear overall vision, or concept of my department's purpose,</td>
<td></td>
</tr>
<tr>
<td>function, and responsibility (its contribution, mission, values, and</td>
<td></td>
</tr>
<tr>
<td>focus)</td>
<td></td>
</tr>
<tr>
<td>2. I spot the critical issues and upcoming problems my department will</td>
<td></td>
</tr>
<tr>
<td>need to deal with</td>
<td></td>
</tr>
<tr>
<td>3. I have the facilitation skills necessary to effectively lead a group</td>
<td></td>
</tr>
<tr>
<td>to consensus</td>
<td></td>
</tr>
<tr>
<td>4. I teach and coach people skilfully to help them handle specific</td>
<td></td>
</tr>
<tr>
<td>challenges and problems</td>
<td></td>
</tr>
<tr>
<td>5. I keep up-to-date on what's going on with my department</td>
<td></td>
</tr>
<tr>
<td>6. I keep an open mind when hearing others opinions</td>
<td></td>
</tr>
<tr>
<td>7. I show genuine concern for employees as individuals</td>
<td></td>
</tr>
<tr>
<td>8. I maintain good systems that help people work productively</td>
<td></td>
</tr>
<tr>
<td>9. I set a good example with my work habits</td>
<td></td>
</tr>
<tr>
<td>10. I foster a sense of teamwork and build enthusiasm for group projects</td>
<td></td>
</tr>
<tr>
<td>and assignments</td>
<td></td>
</tr>
</tbody>
</table>

**Scoring - Add your scores up and then find your total below:**

45-50 you lead with confidence and your followers knows where you are going.
40-44 you’re well on your way to effective leadership; keep focused and stay on the road.
35-39 Sometimes you get off track and your followers are left wondering what to do next.
30-34 with no clear path in mind your followers are left to their own devices.
25-29 Your followers are finding it difficult to follow your lead and may be looking for a new leader.
### Your Management and Leadership Systems

Select the value that most represents your current situation.

1. **Shared Sense of Purpose**
   - 1. We have a clear, written Mission, Vision and set of mutual Values for the organization.
   - 2. We have a carefully developed strategic plan, derived from our Mission, Vision and Values, and from our SWOT analysis.
   - 3. If asked, virtually all employees would know and understand the basic points in our Mission, Vision, Values and business strategies.
   - 4. We continuously track progress towards objectives and goals with all projects, activities and events.
   - 5. When leading and directing others, managers always explain the “why” (the opportunity in context) as well as the “what” (the objectives).

2. **Optimized Work Processes**
   - 6. Our work processes (i.e., the step-by-step flow of work) are documented.
   - 7. We continuously track, measure and analyze how effectively our processes are working.
   - 8. When we solve a problem, it stays solved—it does not recur.
   - 9. Our systematic approach to doing business is consistent, predictable and easily coordinated across the organization.
   - 10. We use internal systems that are adaptable, supportive of innovation and helpful in learning from past mistakes.

3. **Developing and Supporting People**
   - 11. We have a good system for advertising for, interviewing and hiring people, based on technical skills and behavioural “fit”.
   - 12. Most employees would say that this is a great place to work, and would recommend it to others.
   - 13. We have a formal system for giving performance feedback to all employees, including managers.
   - 14. We teach our managers leadership skills, not just technical skills.
   - 15. We have a supportive culture that encourages effective leadership, teamwork, and open communication at all levels of the organization.
Ensuring Product Performance

16. We have formal systems for tracking customer satisfaction, including surveys, focus groups, complaint tracking, etc.

17. Customer feedback directly influences our decisions and behaviours in creating and delivering products and services.

18. We train, coach and encourage all employees to have positive direct contact and interaction with customers when and where possible.

19. Our messages and strategies are focused on satisfying and appreciating customer’s interests and delivering the value they want, at a margin we need.

20. Our Products and product line extensions are correctly positioned in the market for domination vs. competition.

Total Score (maximum 100 points)
Below are some general scoring ranges.

<table>
<thead>
<tr>
<th>Score</th>
<th>0 – 40</th>
<th>41 – 60</th>
<th>61 – 80</th>
<th>81-100</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>Danger zone, uncertain future!</td>
<td>Need better organizational action</td>
<td>Need to keep moving on track</td>
<td>Maintain peak performance</td>
</tr>
<tr>
<td><strong>Comfort Quotient</strong></td>
<td>If you aren’t already worried, you should be.</td>
<td>Frustration and stress levels are high in some areas.</td>
<td>A positive direction with real opportunity for improvement.</td>
<td>Go from good to great with focus and refinement.</td>
</tr>
</tbody>
</table>
Balancing Your Managing and Leadership Styles

Mind Shift – Manager to Leader and Back

“Leadership is the art of accomplishing more than the science of management says is possible.”

Colin Powell, Past U.S. Secretary of State

The combination of both effective management and effective leadership is essential to achieve success in our increasingly complex organizations. By contrasting and understanding the differences between the two, we can come to realize how/when to balance leadership with management functions in order to improve upon our roles in respective organizations, communities, etc. We know that we need management skills in the functions of planning, organizing, leading and coordinating activities; and that we need to combine these with leadership skills of, for example, innovation/action/vision and influencing and inspiring people. The key is that we must be able to emphasize different skills at different times - presenting a challenge to get the correct balance between management and leadership and back.

There are views in the literature that assert, as a broad generalization, that managers concern themselves with tasks while leaders concern themselves with people. Or that a key distinction between management and leadership is that we manage things such as systems, processes and physical assets and we lead people. Leadership is viewed as a way of being; management is a way of doing. Others go further to describe differences between managers and leaders. For instance, according to Jim Clemmer (2003), a dichotomy between managers and leaders is described in the following complementary strengths:

<table>
<thead>
<tr>
<th>Management</th>
<th>Leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processes</td>
<td>People</td>
</tr>
<tr>
<td>Facts</td>
<td>Feelings</td>
</tr>
<tr>
<td>Intellectual</td>
<td>Emotional</td>
</tr>
<tr>
<td>Head</td>
<td>Heart</td>
</tr>
<tr>
<td>Position power</td>
<td>Persuasion power</td>
</tr>
<tr>
<td>Control</td>
<td>Commitment</td>
</tr>
<tr>
<td>Problem solving</td>
<td>Possibility thinking</td>
</tr>
<tr>
<td>Reactive</td>
<td>Proactive</td>
</tr>
<tr>
<td>Doing things right</td>
<td>Doing the right things</td>
</tr>
<tr>
<td>Rules</td>
<td>Values</td>
</tr>
<tr>
<td>Goals</td>
<td>Vision</td>
</tr>
<tr>
<td>Light a fire under people</td>
<td>Stoke a fire within</td>
</tr>
<tr>
<td>Written communication</td>
<td>Verbal communication</td>
</tr>
<tr>
<td>Standardization</td>
<td>Innovation</td>
</tr>
</tbody>
</table>

By comparing the two complementary strengths, we can see that there are indeed times when both management and leadership characteristics need to be emphasized depending on the specific situation. When management and leadership are not in balance, detrimental situations may arise. For instance, if there is leadership without management, the vision or direction is established,
without too much consideration for the systems, processes and planning required to achieve successes. Conversely, management without leadership tends to generate a lack of innovation, creativity – inspiration is lacking and human activities become merely processes. When leadership and management are combined, we see new directions and the resources to achieve it are managed according to principles established.

**Delegation**

Are you feeling stressed and overloaded? Do you feel stalled in your career? Do you work alone? There is only so much you can do during your working hours, only so many people who you can help by doing tasks. Because you can only help so many, your success is limited. If you are good at your job, people expect more from you – leading to a sense of pressure and work overload. If you can find away around the limitations, you can be successful.

How do we do this? - by learning to delegate your work to other people. Done well, you can build a strong and successful team of people.

Why don’t we delegate? Mostly because it takes some up-front effort. It is easier to do the project yourself, as you know the content inside and out. This is not always the best use of your time as sometimes your skills are better utilized elsewhere. By involving others, you will help strengthen others’ abilities and skills and the next time, you will be better able to delegate to your strong team.

When to delegate? Five key questions you need to ask yourself:

- Is there someone else who has the necessary information or expertise to complete the task?
- Does the task provide an opportunity to grow and develop another person’s skills?
- Will the task recur in the future? Or a similar task?
- Do you have enough time to delegate the job effectively?
- Is this a task I should delegate?

If you have answered ‘yes’ to some of these questions, it could well be worth delegating the task.

You’ve decided to delegate? What do we now need to consider? To whom should you delegate? Well let’s look at the factors that need to be considered:

- The experience, knowledge, and skills of the individuals as they apply to the delegated task. Do they need any training?
- What is their preferred work style? Independent, long-term goals?
- Their current workload. Do they need to reassign some of their work to take on this task?

It is normal that the person may take longer than you to complete the task but remember they are still learning.

How Should We Delegate? To delegate successfully, try these principles:

- Begin with the end in mind and specify the desired results.
- Identify the constraints and boundaries. Where are the lines of authority, responsibility and accountability?
Include people in the delegation process. Empower them to decide what tasks are to be delegated to them and when.

Amount of responsibility should equal the amount of authority. Ultimately, you are accountable.

Delegate to the lowest possible level. The people who are closest to the work are best suited for the task as they have the most intimate knowledge.

Provide support and be available to answer questions.

Focus on results. Your way is not necessarily the only or even the best way!

If there is a problem, don’t allow the person to shift responsibility for the task back to you.

Build motivation and commitment. Provide recognition where deserved.

Establish and maintain control. Use timelines, deadlines and checkpoints. Make adjustments as necessary.

Once you have worked through the above steps, make sure you brief your team member appropriately. Make them understand why they were chosen for the job, what’s expected from them, the goals of the project, all timelines and deadlines and the resources that they can use to draw from. Make it clear that if there are problems, you want to know and are available for any questions or guidance as the work progresses. When you delegate, you need to find the balance between giving enough space for people to use their abilities to best effect while still monitoring and supporting closely enough to ensure that the job is done correctly and effectively.

When you receive the delegated work back to you, set aside enough time to review thoroughly. If you aren’t satisfied with the work, you need to return the work to the team member. This will enable them to do the job properly. Otherwise, you will have to take on the extra work. If the work is good, make sure to recognize and reward the effort. As a leader, you should get in the practice of complimenting members of your team every time you are impressed by what they have done. This will go a long way toward building team member’s self-confidence and efficiency.

Key Points:

Delegation can feel like more hassle that it’s worth but by delegating effectively, you can hugely expand the amount of work that you can deliver.

When you arrange the workload so that you are working on the tasks that have the highest priority or you, and other people are working on meaningful and challenging assignments, you have a recipe for success.

To delegate effectively, chose the right tasks to delegate, identify the right people to delegate to, and delegate in the right way. You will achieve so much more once you’re delegating effectively.  

Leadership and Management A Winning Combination
Tools for Positive Management and Leadership

Positive Problem Solving

When the elder John D. Rockefeller was setting up the Standard Oil Company, he said, “The ability to deal with people is as purchasable a commodity as sugar or coffee, and I will pay more for that ability than for any other under the sun.”

A positive, problem-solving approach is more productive and effective for the organization than a negative, problem-raising attitude. The same applies in empowering communities. Problems exist. That is a fact of life.

Making mistakes is a characteristic of being human. We all make mistakes. No one is perfect; to err is human. So that means we, as managers, must be aware that people will make mistakes. That is a fact of life that we need to accept.

It is how we respond or react to those mistakes that are crucial to good or bad management. If we get upset and complain or criticize the person or group that makes a mistake, we do not correct the mistake. We add to the problem.\(^\text{13}\)

Problem solving, involves people in dispute working together to come up with mutually acceptable solutions to their differences. Problem solving is the most informal approach to dispute resolution, and also the foundation of all approaches to dispute resolution, both formal and informal.

Positive problem solving involves people working together in a voluntary and co-operative way to find a solution to a given problem. In this approach, people have the greatest degree of control over the process and flexibility in the outcome. They do not come to a meeting knowing in advance how they want the problem solved. They are open to ideas and suggestions, and they are willing to find solutions that work for everyone. This approach can only be successful if people are able to agree about what the issues are and are willing to work together to resolve them. Everyone’s needs and expectations must be taken into consideration. The benefit is they work it out themselves. No third parties are involved.

Negotiation is similar to problem solving. The difference is that, before they meet one another, people already have solution(s) in mind that would meet their needs. In negotiation, people explore the issues, as well as expectations, motivations, and goals, and they try to find common ground between them. This common ground may be the basis for a successful resolution. In this approach, people generally work things out themselves, but sometimes an outside facilitator may be helpful.

Formal approaches to dispute resolution become necessary when people in dispute no longer feel they can resolve the dispute or control the situation by themselves.
Approaches to Positive Problem Solving

Most problems can be resolved, and most problems are worth resolving. By working together to resolve problems, everyone benefits from the results. It is in the best interest of everyone, to try to resolve problems as quickly and fairly as possible.

One way of dealing with problems is to ignore them, but this may not produce the desired results. In many cases, a problem left unresolved could become a larger issue than it was to begin with. Once you have made a decision to resolve a problem, it is important to explore your options and decide upon the next step.

Before taking action in any problems solving process, it is worth taking some time to carefully consider the situation and ask these questions:

¬ What exactly is the problem about?
¬ Who is involved in the problem?
¬ Is the issue important enough to pursue?
¬ Is this something that can be worked out by you and the other person or people who are involved in the dispute?
¬ Are you willing to work this out with the other person or people who are involved in the problem?
¬ What would solve the problem for me?
¬ How would I like to see the problem resolved?
¬ What are the benefits of this particular resolution?
¬ If the problem has to do with a colleague, how will that colleague benefit?
¬ Do I have all the information I need about the situation?

Problem Solving involves people working together in a voluntary and co-operative way to overcome their differences.

Once you have decided to begin a positive problem-solving process these are the basic steps and guidelines to follow:

**Determine who is involved.** It is important to identify who is most directly involved in the dispute, and most likely to be able to influence the outcome. It may be necessary to gather information about the rights, roles, and responsibilities of the people who are involved, including your own.

**Contact the person most directly involved.** If that person is not available, leave phone numbers and times when you can best be reached. When you have the opportunity to have a conversation, voice your concerns calmly and clearly. Often, disputes can be resolved at this stage.

**Arrange a meeting.** If it appears that the dispute cannot be resolved with a simple phone call, the first thing to do is to arrange a meeting. You and the other person or people involved should agree on a time and place that works for all of you.
Prepare. It is important to find out about the protocols and procedures for dispute resolution that may be in place in your organization. Be aware of what options are available, and whom to contact if solutions are not agreed upon. Find out what supports and resources are available within your organization. Gather information. Find out the facts about the dispute. Understand the rights, roles, and responsibilities of the people who are involved. Be prepared to clearly state your concerns, motivations, and goals. Be prepared to listen and offer feedback. Be prepared to ask questions. There may be solutions that you had not even considered.

Meet. It is important to be aware of how you can help create a balanced power situation, a warm and caring climate, and a fair and open process. Make it clear that you are willing to co-operate to resolve your differences. Agree upon an approach to resolve the dispute. Make sure you have explored all possibilities of problem solving before moving to another level.

Set guidelines and ground rules. Listen actively. Ask open-ended questions. Check one another’s understanding of what has been said. Respect each other’s point of view. Look for common ground. Identify the nature of the problem, your goals, and the best way to reach a solution. Stay focused on the benefits of resolving the issue. Avoid emotional hooks and unrelated issues. Keep out of the realm of personal attacks.

Conclude the meeting. When the meeting is over, make sure to put the solutions you have agreed upon in writing. This should be in clear language and it should include a plan to carry out these solutions. Set a date to discuss the success of the plan. The meeting may have ended with people agreeing to disagree. If so, it is important to have a conversation about whether the matter will be closed or if further steps in the dispute resolution process will be taken.

Follow Up. Make sure there is a follow-up meeting to discuss the success of the dispute resolution plan. If the meeting does not take place face-to-face, a follow-up phone call is recommended.

Even if the dispute has not been successfully resolved, a follow-up meeting or phone call to check in or “touch base” is a good idea. This is the kind of ongoing communication that builds, rebuilds, and maintains the trust that is so important in a positive work environment.  

Generating Commitment

In order to generate commitment, a leader must understand what commitment achieves. Commitment ignites action. Once you commit, you pledge yourself consistently to a purpose or line of conduct.

How do you achieve commitment of your team?

- Team bonding – encourage them to be part of the group so they want to be part of the group
- Acknowledge and Appreciation of their contributions
- Distribution of responsibility – this gives each a role and an opportunity to contribute

“... the basic philosophy, spirit, and drive of an organization have far more to do with its relative achievements than do technological or economic resources, organizational structure, innovation, and timing. All of these things weigh heavily in success. But they are, I think, transcended by how strongly the people in the organization believe in its basic precepts and how faithfully they carry them out.”

Thomas J. Watson, Jr., A Business and its Beliefs – The ideas that helped build IBM
Overcoming Resistance to Change

The purpose for this section on tools for positive management and leadership is to provide you with some broad, generalized ideas that offer assistance with ‘overcoming the resistance to change’ in one’s respective environment. Similar to information available on the subject of leadership, the literature on change management is abundant. Using some ideas from this wealth of information, this section will first shed light on some of the common reasons people resist change and then provide a model to overcome resistance when change is inevitable – a model that is not overly complicated and is relatively easy to identify with.

According to A.J. Schuler there are ten top reasons people resist change in organizations, communities or governmental agencies.

These are as follows:

- change is seen as risky business
- people feel emotionally connected to other people and change threatens that connectedness
- the concept of change does not provide role models to demonstrate that the change will work
- people fear that they lack the competence to change
- people feel overloaded or overwhelmed by the concept of change
- people are sceptical and want to be certain that new ideas are solid
- people fear hidden agendas
- proposed change can threatens one’s identity
- there is an anticipation (by some) that change can produce loss of status or quality of life
- some ideas on change might just be a bad idea

Now that we have delineated ten common reasons that contribute to resistance to change, it is beneficial to identify common factors that serve to mitigate resistance and build commitment to change. The two models that these recommendations to improve success for leaders and managers embarking upon change are: People Centred Implementation and ADKAR.

First, People Centred Implementation (PCI) is a change management methodology developed by ‘Changefirst’ and has been utilized since the 1990s by organizations in over 35 countries around the world. These are the six factors that PCI recommends:

- Create and share a powerful case for change in the organization.
- Develop strong change leadership for the initiative
- Build and deliver plans to engage people in the change
- Build understanding and commitment of middle and front-line managers
- Create commitment and behaviour changing actions for front-line people
- Support people as they learn to adapt, managing their resistance sensitively and empathetically.
Second, the ADKAR model proposes that there are five individual level building blocks required for successful change. This model was first developed in 1999 by Prosci utilizing data gathered from 1,000 organizations over the span of 59 countries. Later in 2006, Jeff Hiatt, founder and president of Prosci, published a book called “ADKAR: A model for change in business, government and our community”. The book provides an in depth examination at each of the five blocks to assist managers/leaders improve outcomes of change. The checklist for these building blocks for individuals, managers and leaders asserted in this model are:

- Awareness - of why the change is needed (if people do not understand the rationale for change = resistance)
- Desire – to support and participate in the change (individuals need to make the choice to engage and personally support the change)
- Knowledge – of how to change (training and education needs to be adopted as a process of change)
- Ability – to implement new skills and behaviours (the model of change is realized at this point in the process)
- Reinforcement – to sustain the change (i.e. recognition and rewards are offered to sustain change)

Change is that everlasting constant that summons our energies, commitment, innovation, and awareness in order to make it a success. Hopefully, the ADKAR checklist and the six PCI factors for change can mitigate challenges and carve a path of least resistance along a journey of change.

**The Power of Reciprocity**

Reciprocity will make a difference in your positive role as a leader and manager. A mutual or cooperative interchange of favours or privileges, mutual dependence, action, or influence starts with you. You can make a difference with your coworkers and the staff you lead when you take into consideration some of the following gifts:

One of your most valuable assets is time. Though most managers are short on this, it’s free. Along with time, providing your undivided attention is most valued. A true leader will take the time to stop the multitasking and listen carefully. Providing your knowledge, ideas and feedback are essential in getting more from your staff. Most people want to hear what you think; but taking into consideration that it’s also too easy to put in your 2-cents worth; so hold back if you feel the situation requires it. And finally, a manager and leader can provide some perks by not being so rigid. You will see that you will get more from the staff by letting a situation take its natural path, though it may not have been what you would have done.

There are two important lessons with reciprocity. The first being if you give, it will be given back to you. You may be pleasantly surprise that sometimes you get back more than you give. This usually
always happens when a person is in a right state of mind either professionally or personally. The second lesson is learn to give without hoping of getting anything back, is sometimes hard to accept but is necessary.

**Work-Life Balance**

You want to achieve a balance between your professional and personal life but find it difficult, if not impossible to do so.

Many of us recognize that we are not meeting our need for achievement and enjoyment in life, but we do not know what to do about it, or where to start in finding a solution.

One of the ways to understand balance is to understand your current state of “wellness”. The concept of wellness has been recognized as a process with multiple dimensions that change and grow throughout a person’s lifetime. The multi-dimensions of wellness are interconnected and work together to maintain a balance in your everyday life.

Work-Life Balance does not mean an equal balance. Trying to schedule an equal number of hours for each of your various work and personal activities is usually unrewarding and unrealistic. Life is and should be more fluid than that. Your best individual work-life balance will vary over time. The right balance for you when you are single will be different when you marry, or if you have children; when you start a new career versus when you are nearing retirement.

Your best, individual work-life balance will vary during one’s lifetime. For example, the right balance for you when you are single will be different from that of a married person and will be different again as a parent.

There is no perfect, one-size fits all; balance is what you should be striving for. The best work-life balance is different for each of us because we all have different priorities and different lives.

From our research, we found that depending on where one is at in their lifespan, one’s wellness dimensions can be different (see fig 1 below).

<table>
<thead>
<tr>
<th>11 to 20</th>
<th>21-40</th>
<th>40-60</th>
<th>&gt; 60</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAREER</td>
<td>FAMILY</td>
<td>FAMILY</td>
<td>FAMILY</td>
</tr>
<tr>
<td>FAMILY</td>
<td>PHYSICAL</td>
<td>PHYSICAL</td>
<td>PHYSICAL</td>
</tr>
<tr>
<td>FINANCIAL</td>
<td>SLEEP</td>
<td>FINANCIAL</td>
<td>MENTAL</td>
</tr>
<tr>
<td>INTELLECTUAL</td>
<td>SOCIAL</td>
<td>EMOTIONAL</td>
<td>FINANCIAL</td>
</tr>
<tr>
<td>MENTAL</td>
<td>CAREER</td>
<td>SLEEP</td>
<td>SOCIAL</td>
</tr>
<tr>
<td>PHYSICAL</td>
<td>EMOTIONAL</td>
<td>HOBBIES</td>
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</tr>
<tr>
<td>SOCIAL</td>
<td>MENTAL</td>
<td>SOCIAL</td>
<td>INTELLECTUAL</td>
</tr>
<tr>
<td>DREAMS</td>
<td>FINANCIAL</td>
<td>MENTAL</td>
<td>SLEEP</td>
</tr>
</tbody>
</table>

**Fig 1**
Definitions of Wellness

Mental Wellness - can be defined as the capacity to live a full and creative life, and the flexibility to deal with life's inevitable challenges.

Financial Wellness – can be defined as an intricate balance of the mental, spiritual and physical aspects of money. This unique combination is an ideal to strive towards in our dealings with money. Financial wellness is having an understanding of your financial situation and taking care of it in such a way that you are prepared for financial changes. Maintaining that balance consists of being comfortable with where your money comes from and where it is going.”

Social Wellness - is about having positive interactions with others through experiences that we enjoy and value.

Occupational Wellness (career) - is the ability to achieve a balance between work and leisure time, addressing workplace stress and building relationships with co-workers. This dimension involves having a career that is consistent with your values, beliefs and interests.

Physical Wellness - encourages regular physical activity, eating a balanced and nutritious diet, and encourages good physical health with regular medical checkups and discourages the use of tobacco, drugs and excessive alcohol consumption.

Intellectual Wellness - encourages creative, stimulating mental activities. An intellectually well person uses the resources available to expand one’s knowledge in improved skills along with expanding potential for sharing with others. An intellectually well person uses the intellectual and cultural activities in the classroom and beyond the classroom combined with the human resources and learning resources available within the university community and the larger community.” The intellectual person enjoys having an open mind, being creative and problem solving.

Emotional Wellness - emphasizes an awareness and acceptance of one’s feelings. Emotional wellness includes the degree to which one feels positive and enthusiastic about oneself and life. It includes the capacity to manage one’s feelings and related behaviours including the realistic assessment of one’s limitations, development of autonomy, and ability to cope effectively with stress. The emotionally well person maintains satisfying relationships with others”.

Family Wellness – focuses on spending your desired amount of quality time with close and/or extended family members.

Sleep Wellness - Although it is difficult to provide a definition, we can do without sleep for short periods of time, but eventually little or no sleep will lead to poor health. Most research will suggest that we need 7 to 9 hours of sleep per night. The body needs good quality sleep for rejuvenation and repair. Some of the barriers to having a good’s night’s sleep include stress, emotional, physical and environmental health.

Dreams - dreams can be defined as: A series of images, ideas, emotions, and sensations occurring involuntarily in the mind during certain stages of sleep. 2. A daydream; a reverie. 3. A state of abstraction; a trance. 4. A wild fancy or hope. 5. A condition or achievement that is longed for; an aspiration: a dream of owning their own business. 6. One that is exceptionally gratifying, excellent, or beautiful: Our new car runs like a dream.”


There are many tools available to enable an individual to check their work-life balance, however, through the course of our research we recognized that work-life balance is not just about balancing all areas of your life equally; it is about balancing your life to suit your current needs.
Using this approach, we have designed a survey that will enable you to prioritize your desired state of “wellness” with your actual state of “wellness”. It is the gap between each of these dimensions that indicate how close, or out of sync various areas of your life are, and armed with this knowledge, you can devise your “back-to-balance” personal wellness plan to bring you closer to where you would like to be.

**How Wellness Balanced Are You?**

There are two stages to identifying your “wellness balance”:
1. identify your optimum state of balance;
2. identify your actual state of balance and how it differs from you optimum state of balance.

**Stage One - Identify your optimum state of balance**

- On the “wellness wheel” below (see Fig 2), write your eight areas of balance on the outermost area of each section (use the information related to your age group in fig 1 above).
- Now, identify the importance level of each element to you by using 1 as least important and 10 as most important. *Example: if physical and family are on your list and they are both equally important, you can give them the same score.*
- Mark your score on the wheel under the relevant category.

| Insert you eight areas of balance below | Least Important | | | | Most Important |
|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

*Example: if both physical and family scored 8 on your list, put a cross on the number eight line in the physical and family elements of your wheel.*
Stage Two - identify your actual state of balance

Each wellness dimension is given a series of five questions, answer these questions then add up your score and divide your score by 5 for each section. Using a different colour pen, plot the total for each dimension on your wellness wheel under the correct category. For example, if your total score in physical is 40, divide this by five = a score of 8 to plot on the wellness wheel under the career category.

Use the following scale of 1 – 10 to rate yourself on the following dimensions: 1 = no, never - 10 = yes, always

<table>
<thead>
<tr>
<th>Career</th>
<th>Generally, I enjoy my work and find it rewarding</th>
<th>I look for ways of developing new skills and knowledge</th>
<th>I attend a professional development conference at least one time per year or commit sometime to personal and professional growth</th>
<th>I am very satisfied with where I am at in my career</th>
<th>Overall, my career is consistent with my personal values, attitudes and beliefs</th>
<th>Your total divided by 5 is</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Family</th>
<th>I sit down with my family for a meal at least once a day</th>
<th>Generally, there is no tension in my family</th>
<th>I usually have enough time to spend with my loved ones</th>
<th>At least once a year, I enjoy a vacation with my family</th>
<th>I am supportive of my children's and/or spousal activities</th>
<th>Your total divided by 5 is</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Emotional</th>
<th>I am usually positive</th>
<th>I am able to laugh at life and myself</th>
<th>I feel I am able to cope with stress and manage it</th>
<th>I feel good about myself and seldom am I overwhelmed</th>
<th>I seldom feel anxious or upset</th>
<th>Your total divided by 5 is</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial</th>
<th>I plan financially for my future and these habits reflect my values and beliefs</th>
<th>I save a certain percentage of my salary each month</th>
<th>I pay my bills on time</th>
<th>I live within my means and budget each month and manage my debts if I have any</th>
<th>I am happy with my financial picture</th>
<th>Your total divided by 5 is</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Intellectual</th>
<th>I take time to learn for self-enjoyment</th>
<th>I stay current with world affairs</th>
<th>I try new things</th>
<th>I listen and observe and become intrigued by things around me</th>
<th>I commit time to self-development</th>
<th>Your total divided by 5 is</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
### Mental

<table>
<thead>
<tr>
<th>Overall, I feel in balance, mind/body connect</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I know my personal limits and aim not to overextend myself</td>
<td></td>
</tr>
<tr>
<td>I am able to comfort myself or seek support when I am troubled</td>
<td></td>
</tr>
<tr>
<td>In the past month, I seldom felt down, depressed or hopeless</td>
<td></td>
</tr>
<tr>
<td>I feel I am responsible for my feelings and how I express them</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________

### Physical

<table>
<thead>
<tr>
<th>I participate in regular exercise, at least 30 minutes per day</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I eat a balanced and nutritious diet and seldom over indulge</td>
<td></td>
</tr>
<tr>
<td>I always eat breakfast</td>
<td></td>
</tr>
<tr>
<td>I go for an annual check-up with my physician</td>
<td></td>
</tr>
<tr>
<td>I avoid the use of tobacco and drugs and refrain from drinking excessive alcohol</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________

### Sleep

<table>
<thead>
<tr>
<th>I usually sleep 7 to 9 hours per night</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Usually, I sleep well, relaxed and wake up refreshed</td>
<td></td>
</tr>
<tr>
<td>I seldom toss and turn all night</td>
<td></td>
</tr>
<tr>
<td>I have strategies for managing stress</td>
<td></td>
</tr>
<tr>
<td>I have experienced insomnia at least a few nights a week</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________

### Social

<table>
<thead>
<tr>
<th>I interact with friends and family regularly</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I have at least two good friends or support people that I can communicate my feelings to</td>
<td></td>
</tr>
<tr>
<td>I generally like people and I am interested in others, including those from other backgrounds</td>
<td></td>
</tr>
<tr>
<td>I regularly enjoy hobbies or interests outside of work</td>
<td></td>
</tr>
<tr>
<td>I volunteer from time to time</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________

### Dreams

<table>
<thead>
<tr>
<th>I am happy without reason</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I am fulfilling my goals or dreams</td>
<td></td>
</tr>
<tr>
<td>My dreams guide my life</td>
<td></td>
</tr>
<tr>
<td>My dreams define my potential</td>
<td></td>
</tr>
<tr>
<td>I have dreams</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________

### Hobbies

<table>
<thead>
<tr>
<th>I enjoy hobbies in my free time</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>My hobby is as important as my work</td>
<td></td>
</tr>
<tr>
<td>I enjoy activities that do not involve paid work</td>
<td></td>
</tr>
<tr>
<td>I use my hobby to help relieve stress</td>
<td></td>
</tr>
<tr>
<td>I am so involved in my hobbies that I don’t have time for work</td>
<td></td>
</tr>
</tbody>
</table>

Your total divided by 5 is __________
You should now have a wellness wheel that clearly plots your current state of balance and your optimal state of balance. The gap between your current and optimal state indicates how out of balance you currently are.

The next stage for you to consider is identifying which area you wish to focus on, and developing a personal action plan to bring this dimension into better alignment.

**Fig 2 Wellness Wheel**
Managing and Leading in the Present and for the Future

Five key factors emerged that were seen as being clearly more important in the future than in the past:

- thinking globally
- appreciating cultural diversity
- demonstrating technological savvy
- building partnerships
- sharing leadership

One could argue that a manager’s role should become more of a coordinator and counsellor and that a manager should empower through real involvement and access to relevant information. The very nature of managerial work is changing in structure and the competitive pressures associated with this career. The quandary that these changes create means managing for greater innovation and flexibility.

Leading is the essence of an organization. Leaders motivate, console and work with people to keep them bonded and eager to move forward. That means setting a direction, communicating it to everyone who will listen and keeping people psyched when times get tough. This is now truer than ever when competition is high and the future is uncertain.

Consider your current management and leadership style, and if you don’t know, take a hard look at your daily routine, processes and interactions with coworkers. The present is only today; until tomorrow. Knowing and understanding the current climate of change, economy and your immediate organizational pressures will help you see to the future while ensuring that the present doesn’t go out of focus. Managers and leaders should understand the collaborative nature of their styles and come to a winning combination.18
References

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2. Robert House [1977]
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