

Adapting Without Stopping

Navigating Change & Transitions

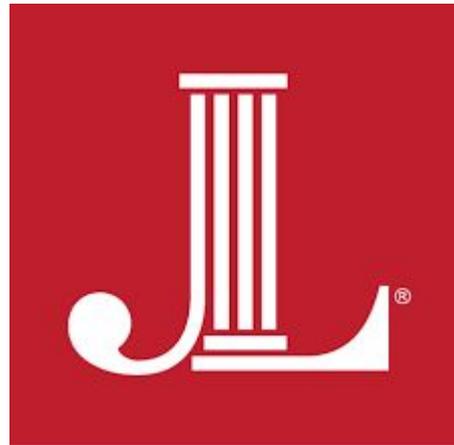
presented by Vicki Clark

BETTER THE
JUNIOR
LEAGUE
TOGETHER



Welcome

Fresno
Long Beach
Napa-Sonoma
Monterey County
Oakland-East Bay



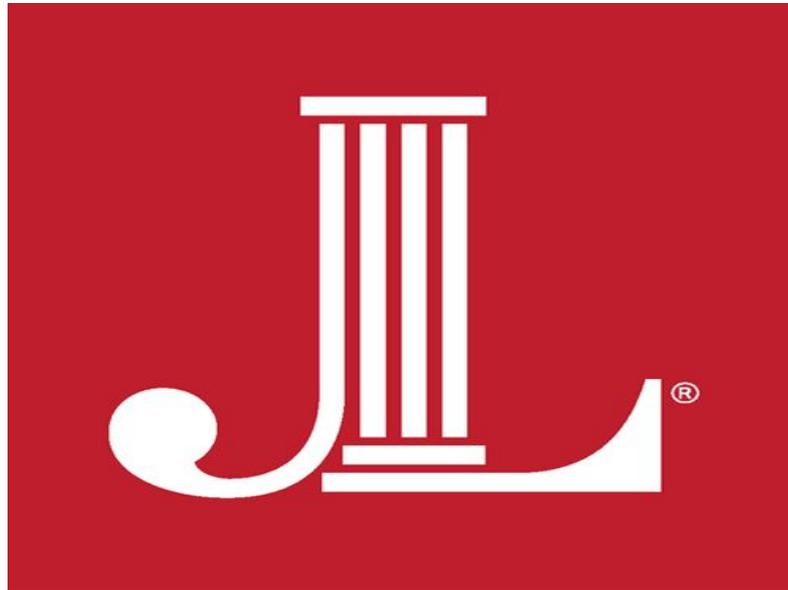
Reno
San Jose
Sacramento
Orange County
San Joaquin County

Palo Alto-Mid Peninsula

Vicki Clark



Navigating Change & Transformation



February, 2020

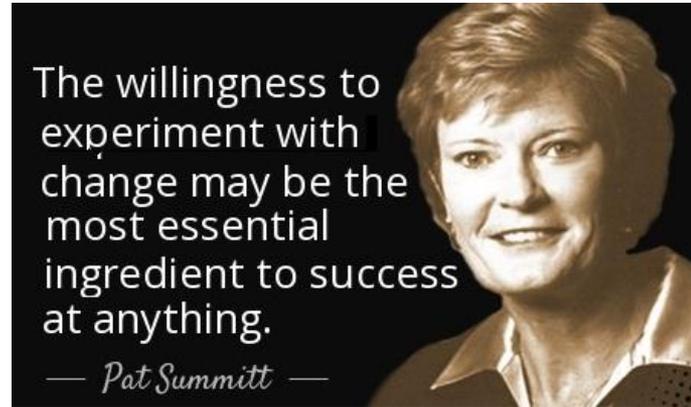
Vicki Clark

Building the Capacity of Organizations

Memphis, TN

What's Changed? *Everything*

- WOMEN
- JUNIOR LEAGUES
- FAMILIES
- VOLUNTEERS
- THE GENERATIONS
- NONPROFIT ORGANIZATIONS
- GOVERNANCE
- BOARD MEMBERS
- COMMUNITY ISSUES
- TECHNOLOGY
- GIVING PATTERNS
- FUND DEVELOPMENT
- VOLUNTEER ENGAGEMENT/MEMBERSHIP STRATEGIES
- PARTNERSHIP DEVELOPMENT
- NONPROFIT MANAGEMENT/ LEADERSHIP
- COMMUNICATION



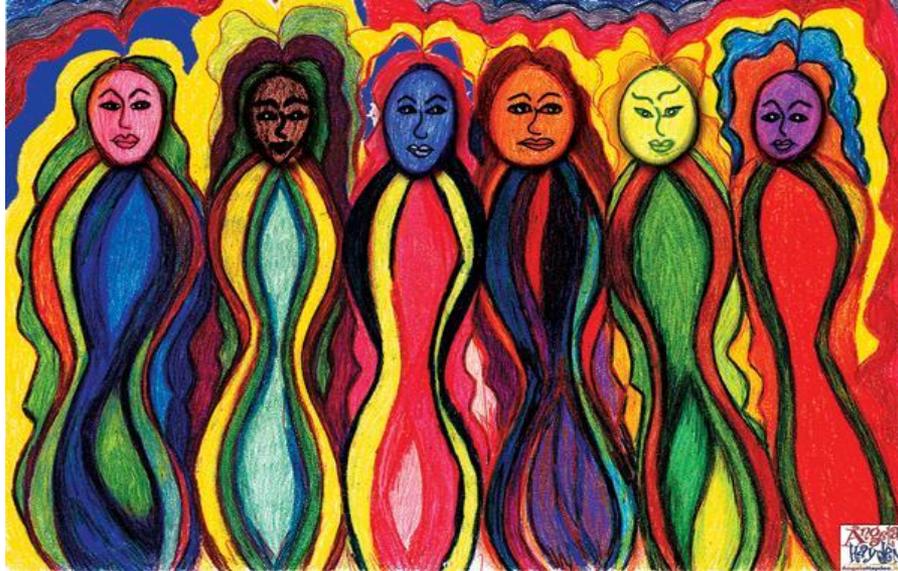
One Mission! One Membership! One League!

The Junior League of is an organization of women committed to promoting voluntarism, developing the potential of women and improving the community through effective action and leadership of trained volunteers. Its purpose is exclusively educational and charitable.



The Junior League Commitment to Diversity and Inclusion

“The Junior League welcomes ALL women who value our Mission.
We are committed to inclusive environments of diverse
individuals, organizations and communities.”



JUNIOR LEAGUES

THE *DREAM TEAM* OF WOMEN LEADERS

5 GENERATIONS - 4 COUNTRIES
ALL WOMEN



WE ARE NOT
A TEAM
BECAUSE WE
WORK TOGETHER.
WE ARE
a team because
WE RESPECT,
trust, and care
for each other.

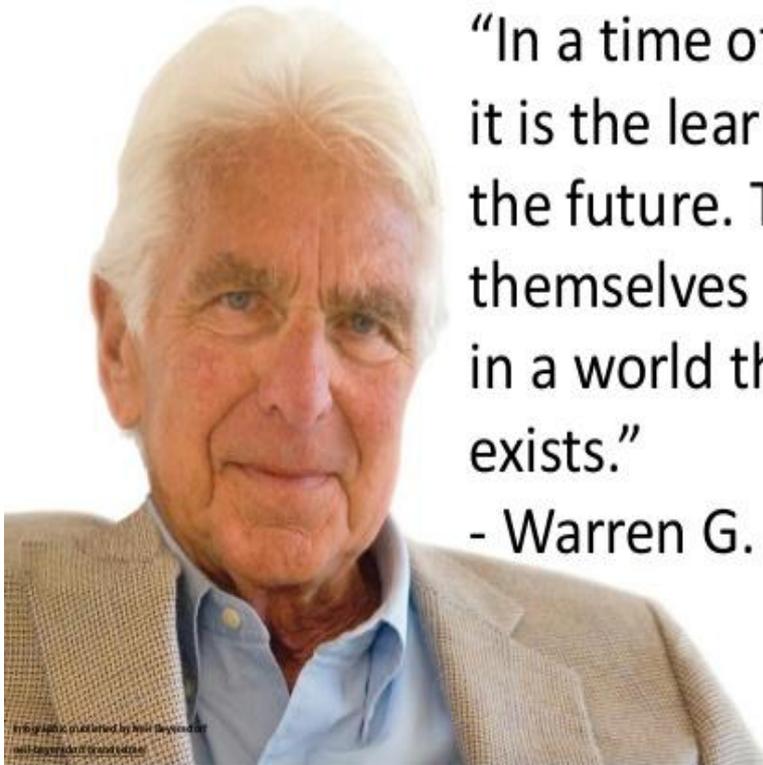
...
@ValaAfshar

“EFFECTIVE ACTION...” Leading Change

“Leaders must create an environment that embraces change not as a threat but as an **opportunity**.” -- Warren Bennis



Junior League Members are Learners



“In a time of drastic change, it is the learners who inherit the future. The learned find themselves equipped to live in a world that no longer exists.”

- Warren G. Bennis

A person's hands are reaching up towards several butterflies flying in a field at sunset. The sky is a warm, golden color, and the ground is covered in tall, dry grass. The overall mood is peaceful and aspirational.

‘ WE NEED TO FORGET WHAT WE THINK WE ARE, SO THAT WE CAN REALLY BECOME WHAT WE ARE. ’

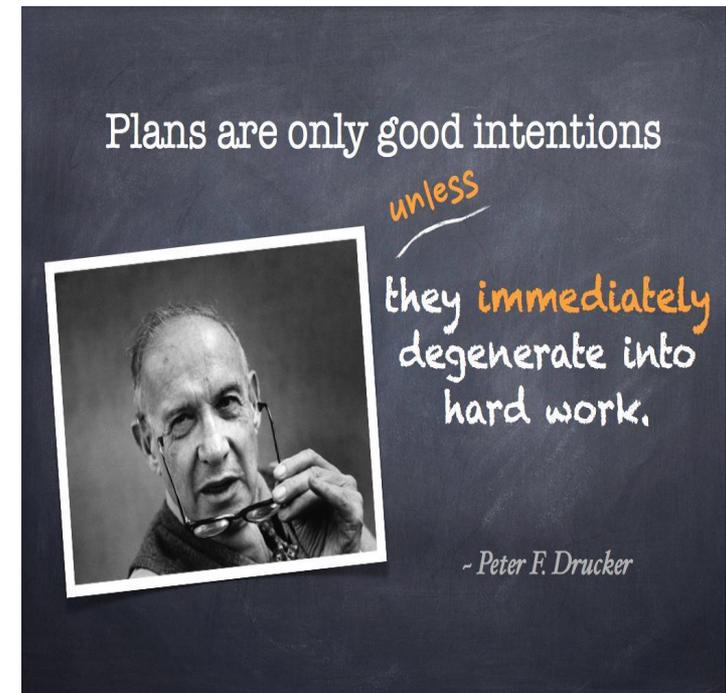
PAULO COELHO
THE ZAHIR



BETTER THE
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TOGETHER

Peter Drucker's "5" for Leaders

1. WHAT IS THE MISSION?
2. WHO IS THE CUSTOMER?
3. WHAT DOES THE CUSTOMER VALUE?
4. WHAT ARE OUR RESULTS?
5. WHAT IS THE PLAN?

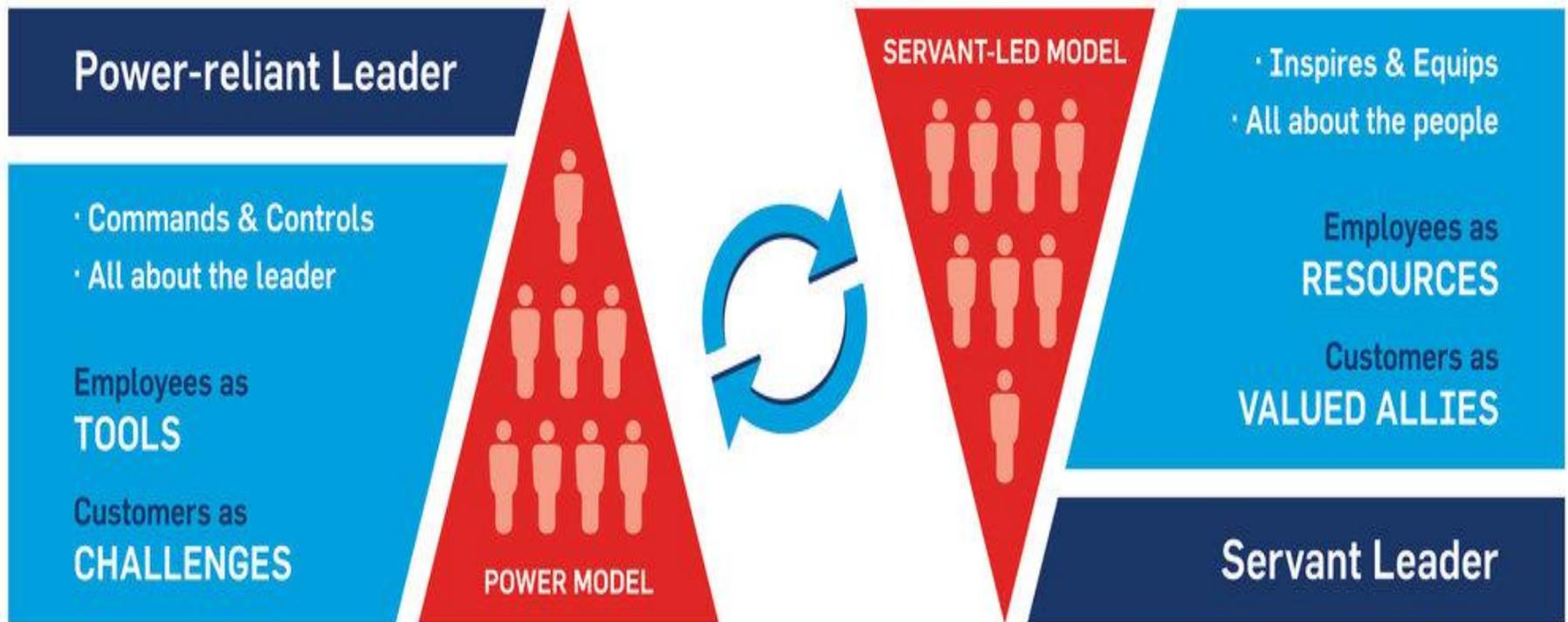


It's All About Mission & Members

Organizations change
when people in
them change.



Flip the Organization Chart™



Effective Leaders

Skills Good Leaders Need

Strategic Thinking

Developing a vision of where you want to be.

Planning & Delivery

Planning how to achieve your vision and dealing with challenges along the way.

People Management

Finding the right people and motivating them to work towards your vision.

Change Management

Recognising, responding and managing changes to your vision and plans.

Communication

Working on the best ways to communicate your vision to others and listening to ideas.

Persuasion & Influence

Encouraging others to help you achieve your vision by demonstrating its advantages.

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The ability to:

- See the big picture
- Initiate innovative ideas
- Conceptualize complexity
- Know the right questions to ask
- Think horizontally



Change vs Transformation

CHANGE FIXES THE PAST- TRANSFORMATION CREATES THE FUTURE

Change vs Transformation

Change is doing
things
differently.

Transformation
is a new way of
being.

A shift in behaviour



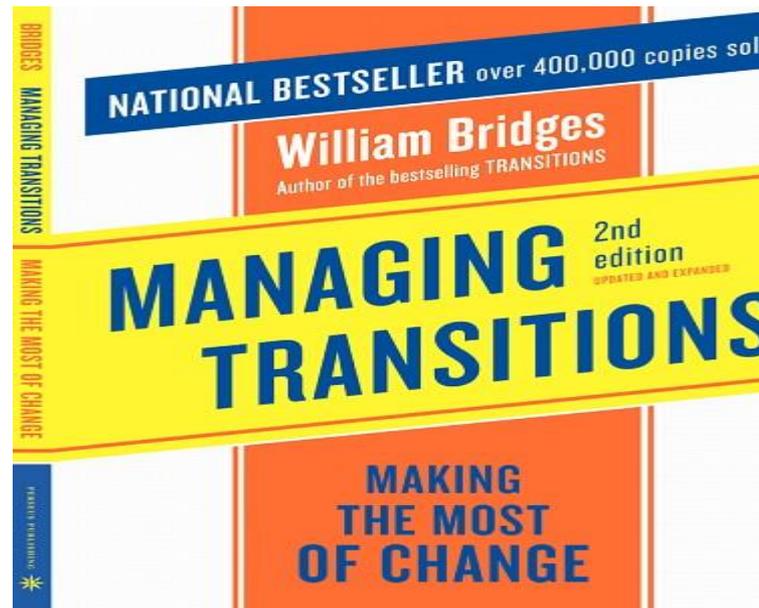
A shift in values

**Transformation
is often more
about
unlearning
then
learning.**

Richard Rohr

William Bridges: The Master of Change & Transition Theory

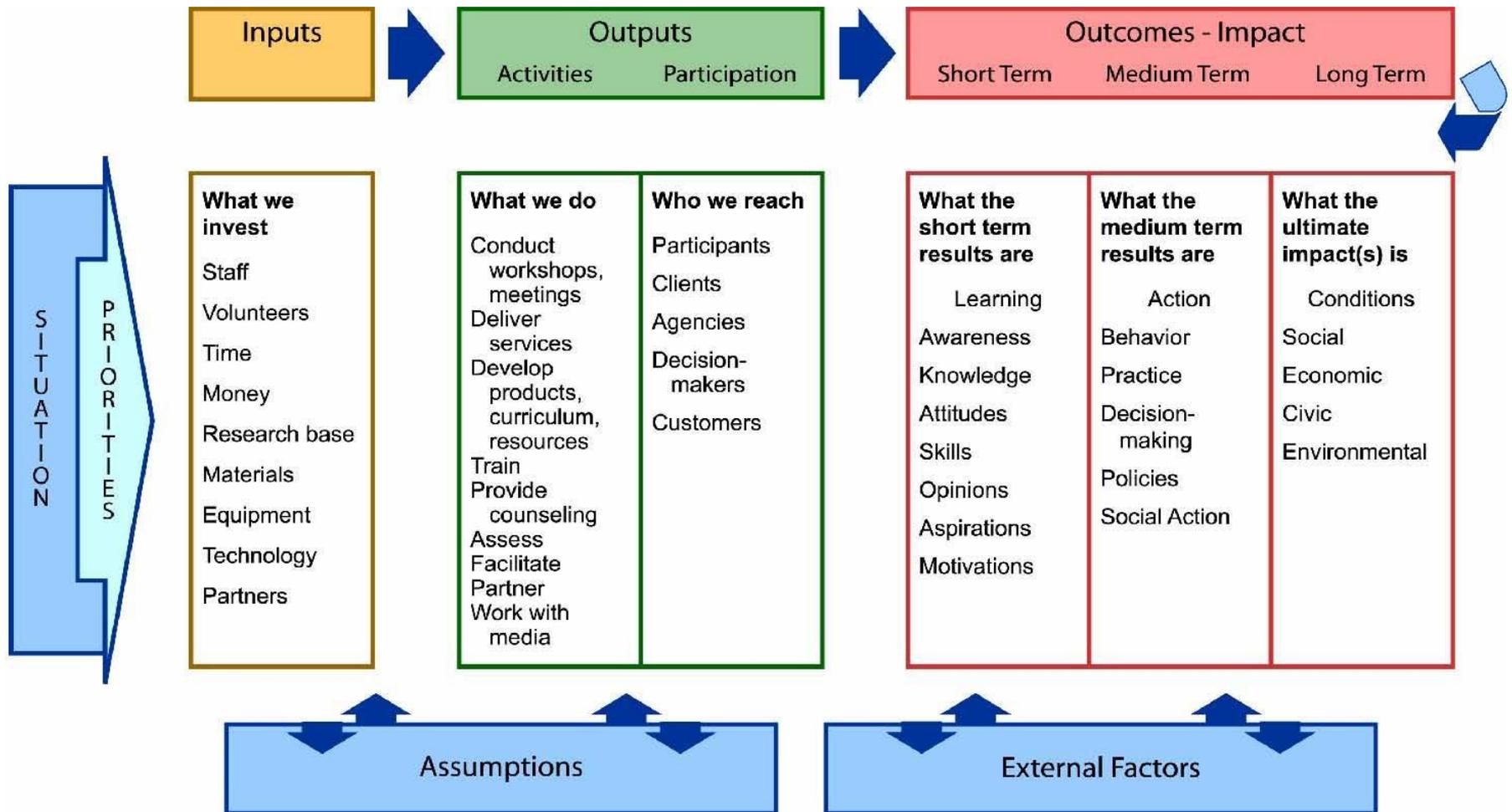
*“Chaos is the primal state of pure energy
for every true new beginning.”*



Mission-Driven, Customer-Centric Change and Transformation

Any changes considered should be put in context of moving the mission of the organization forward.

Logic Model



The average person
generates 25,000 to 50,000
thoughts a day. Change
your negative thoughts to
positive ones and you'd
have a happier and
healthier life.
PositiveMed.com

When you change your
thoughts and perception,
you change the way you live.

Rita Zahara

Change vs Transition

Change Can Be Fast--Transitions Take Time

“It isn’t the changes that do you in, it’s the transitions. Change is not the same as transition. Change is situational.

Transition is the psychological process people go through to come to terms with the new situation. Change is external, transition is internal.”

-William Bridges, Managing Transitions

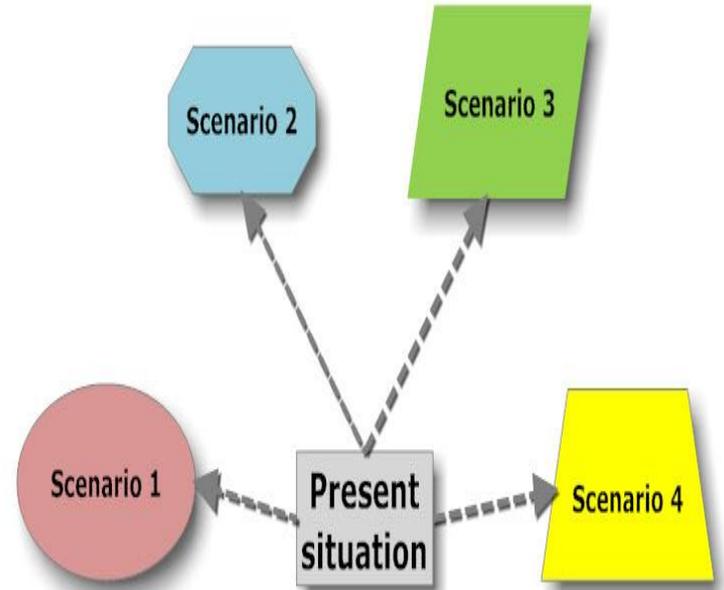
Junior Leagues:

Developing Women as Community & Civic Leadership through...

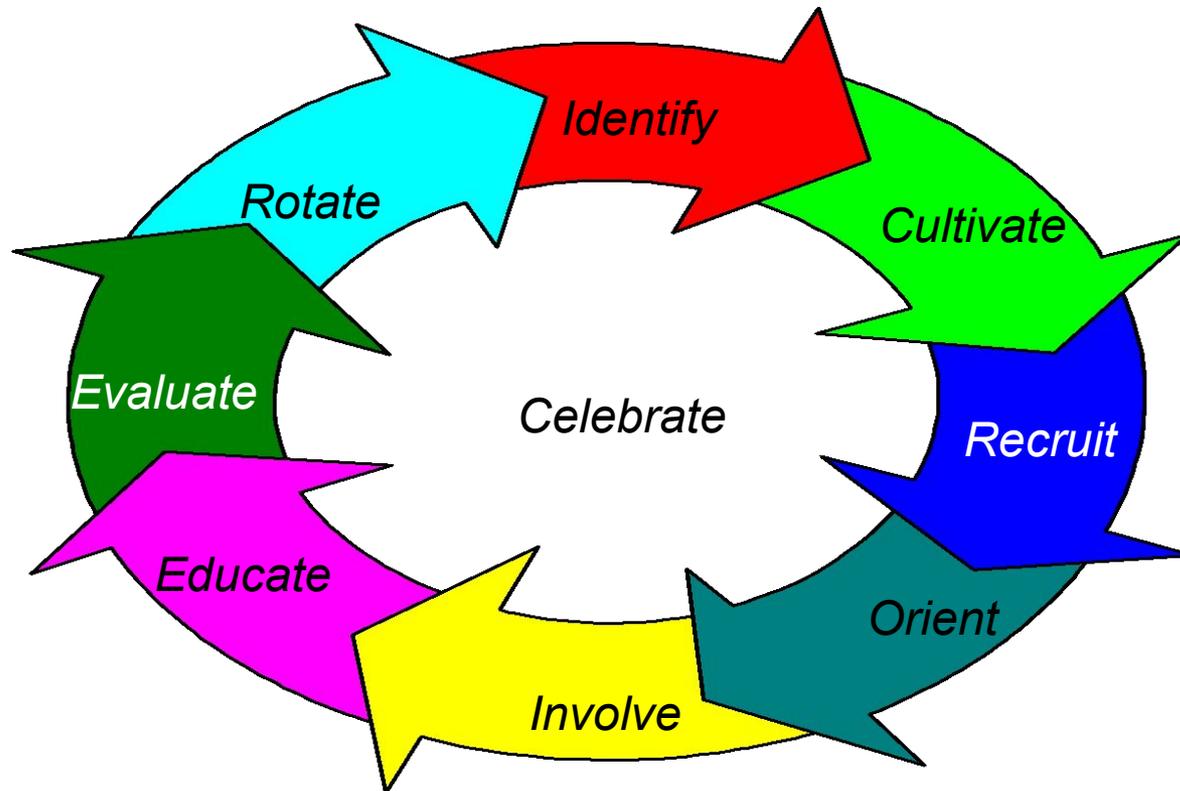


Revisiting

1. Board
2. Management Board
3. Community Engagement
4. Diversity & Inclusion
5. Finance
6. Fund Development
7. Marketing & Public Relations
8. Membership
9. Nominating & Placement

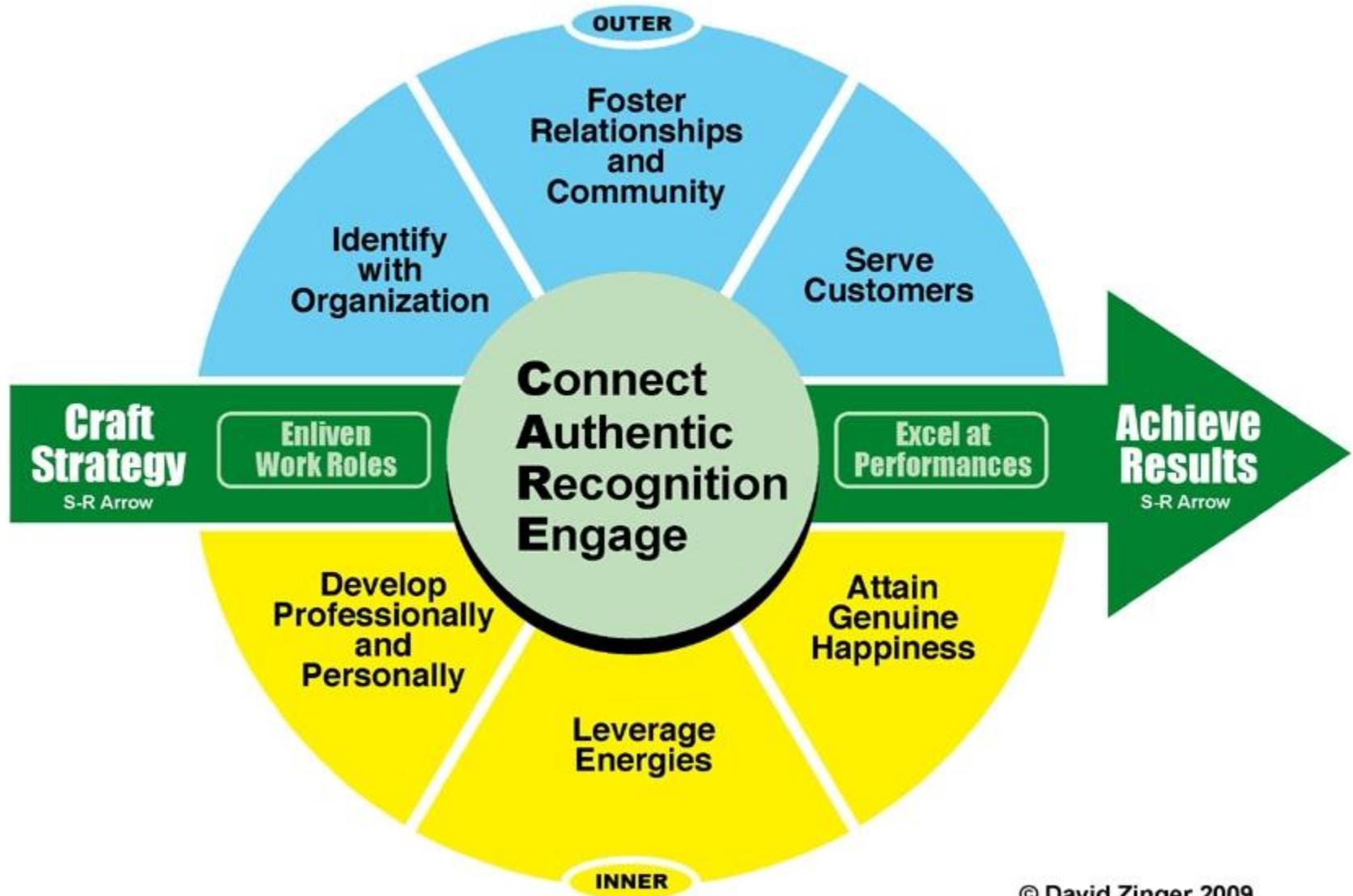


The Junior League Development Cycle



The Zinger Model

Engagement for Results



© David Zinger 2009

Change vs Transformation

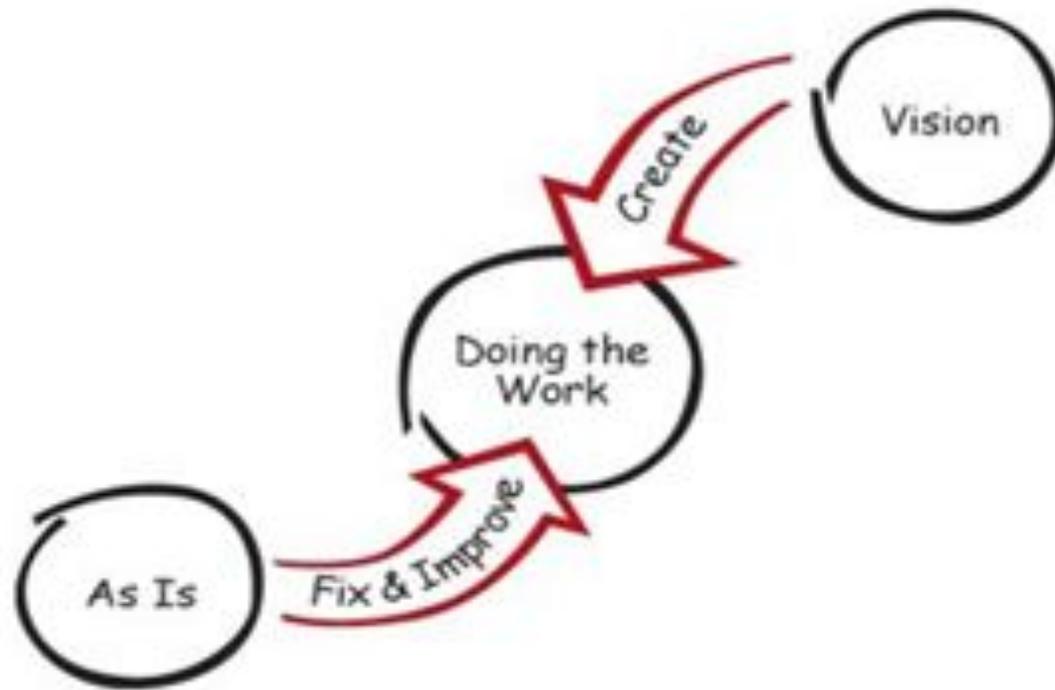
Change fixes the past.

Transformation creates the future.

Nonprofit leaders are often compelled to do both at the same time.



Do You Seek a Better Version of Now or Something New?



Change

Change requires becoming familiar with the current situation, and working to make things better, faster, cheaper, or some other “er” word. The past is the fundamental reference point and actions are intended to alter what already happened.

Transformation

Transformation is an assertion that our actions today create our future tomorrow. The future can be described and realized when you free yourself from constraints of the past.

In transformation, you design the future and invent ways to bring it about.

Transformation doesn't describe the future by referencing the past (better, faster, or cheaper); it births a future that is entirely new.

Like **change, transformation** also begins with firmly grasping the current state of affairs.

In Action

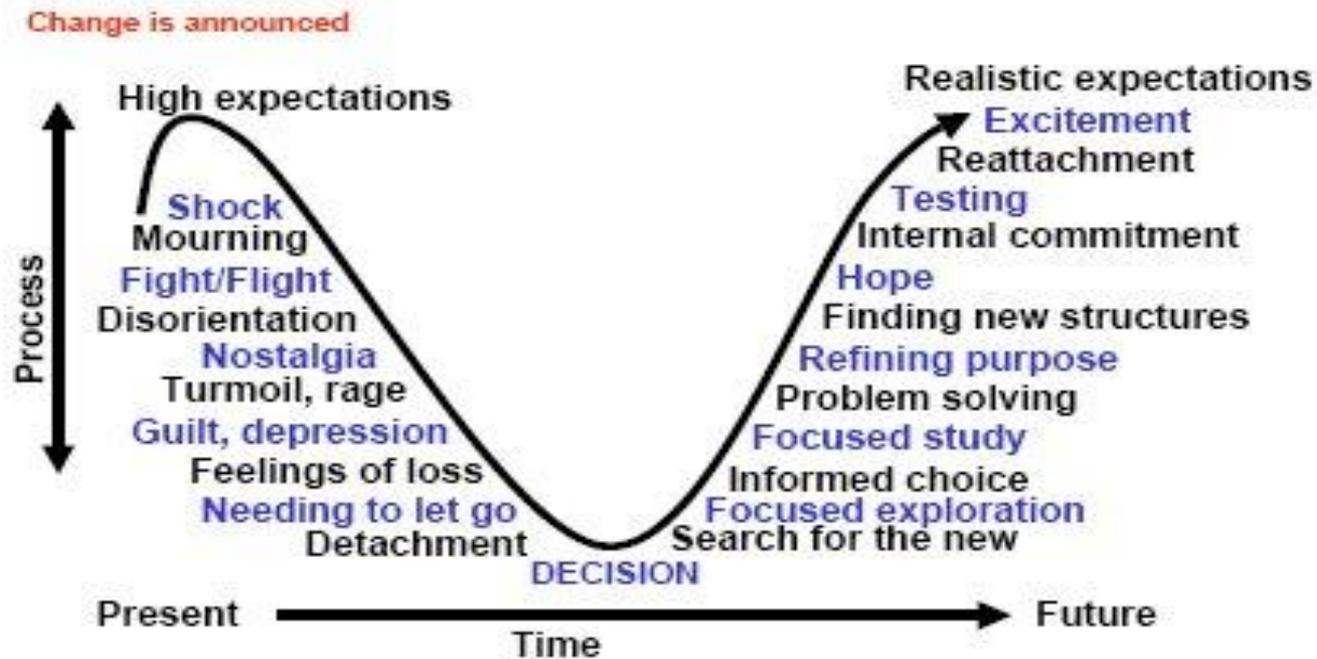
In **change** mode, the desire to improve the past directs what we do. The past sets boundaries and constrains possibilities. Change makes the system better.

In **transformation** mode, the future directs your actions and only the limits of imagination and courage constrain possibilities.

Future Focus: 
THE WAY AHEAD

Hold On...

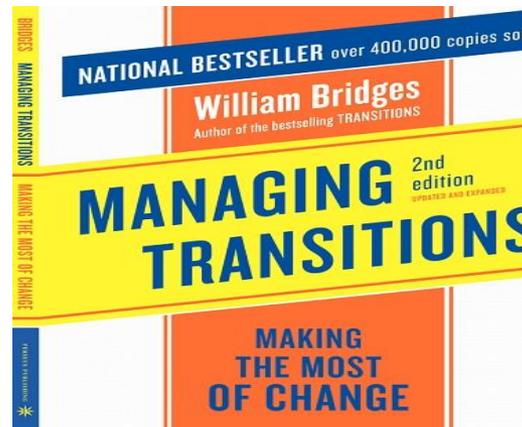
The Roller Coaster of Change



Bridges' Transition Framework

Author William Bridges has developed a simple “Transition Framework” to help people understand and talk with others about the powerful emotions involved.

In the Bridges' Framework, the inner process of adjustment is referred to as a “Transition.”

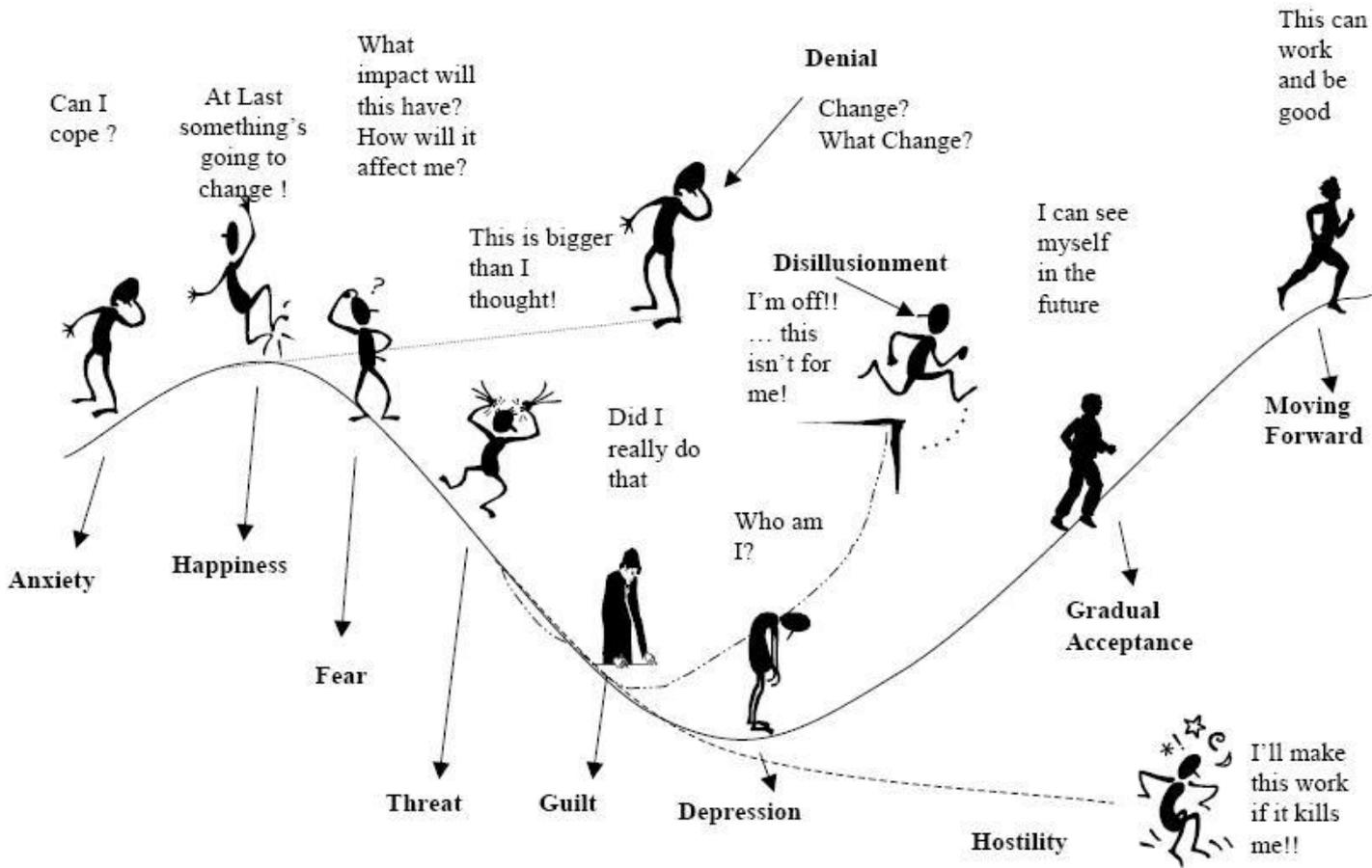


Emotional Roller Coaster

The emotional roller coaster is a natural result of being in transition or experiencing an ending, the loss of routine and/or living in the unknown.



The Process of Transition



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Three Stages of Transition

“Endings,” which can produce sadness, anger and remorse; the

“Neutral zone” which brings fear and confusion along with space for creativity; and a

“New beginning,” a mix of confidence over what has been gained, excitement for what’s to come and anxiety over sliding backwards

Bridges' Transition Theory

Endings	The neutral zone	Moving forward
<ul style="list-style-type: none">• Saying goodbye• Letting go• Losing a sense of identity	<ul style="list-style-type: none">• Need to spend some time here• Uncomfortable• Exploration phase: <i>"the fertile void"</i>	<ul style="list-style-type: none">• New beginnings• Relies on regular and effective communication• Wait to see how others cope?



Bridges' Transition Theory



- Resistance to the Change Initiative
 - Uncertainty and Fear
 - Emotional Upheaval
- Resentment towards the Change Initiative
 - Low Morale and Low Productivity
 - Anxiety about their Role or Identity
 - Skepticism about the Change Initiative
- Acceptance - People have Begun to Embrace the Change Initiative
 - High Energy
 - Openness to Learning
 - Renewed Commitment to the Group or their Role

Endings

This phase begins with an acknowledgment that the change is real; “the way things were” is no longer possible; the sense of loss cannot be avoided. The result is a time of mourning. Eventually, ending means letting go and saying goodbye to the old identity and the old way of doing things.

This often creates fear and anger. But also can create excitement and hope. As we go through life we cannot move ahead without leaving something behind. To move ahead, our goal is to let go of some of what we used to be and find the new person we will become in a new situation.

Neutral Zone

This is the “in-between” phase where we have accepted endings but the new way of doing things doesn’t yet feel comfortable.

The Neutral Zone can be a confusing and chaotic time; it can also be a very creative one. Possibly the hardest part of being in the Neutral Zone is being patient when we feel confused or uncertain.

We need to live with being afraid and confused because that is when we do our best problem solving and when we are at our most creative. We also need to let ourselves explore all paths to new beginnings.

New Beginnings

This phase is where a new way of doing things, a new identity, or a new opportunity for growth and progress comes into focus.

The New Beginnings phase initially brings a feeling of finally having “arrived,” mixed with anxiety about backsliding.

New values, attitudes, and most of all, new identities have emerged.

The New Beginning does not erase the past; a new identity has emerged that includes a new and different understanding of what the past means.



Every Ending is a New Beginning

- **Managing Endings Successfully:** Acknowledging and Sorting Losses; Getting Closure & Letting Go; Seeking Alternatives & Softening and Replacing Losses; Seeking Support & Identifying Continuities, Celebrating accomplishments.
- **Navigating the Neutral Zone:** Regaining Control; Rebuilding Communication, Understanding, Support, and Purpose; Increasing Creativity; Temporary Solutions.
- **Supporting New Beginnings:** Celebrating a New Identity; Ceremonies & Rituals; Building on Small Successes

Opportunities for Change & Transformation

1. If the mission of your League is to continue to move forward, what should be transformed?
2. How will this advance the mission?
3. What value will this provide to the experience of members?



Bridging Organizational Change

1. What change needs to happen?
2. What areas of the League are involved with or affected by the change?
3. Who needs to be involved in the planning?
4. What strategies could be used?
5. What factors are working for and against?
6. What can be done right away and what needs further time, research and implementation?

What Do We Want to Change?

In order to determine what NEEDS to change we should have

- ❑ A situational assessment,
- ❑ A description of “current reality,”
- ❑ An identification of the core problem or conflict
- ❑ Assumptions that sustain it
- ❑ Data provided by evaluation/measurements.

What Do We Want to Change To?

- ✓ We need to identify what needs to change
- ✓ Have a process for deciding what to change to
- ✓ Clearly verbalize the vision/solution
- ✓ Have a description of strategy to attain the desired state
- ✓ Avoid undesirable side effects

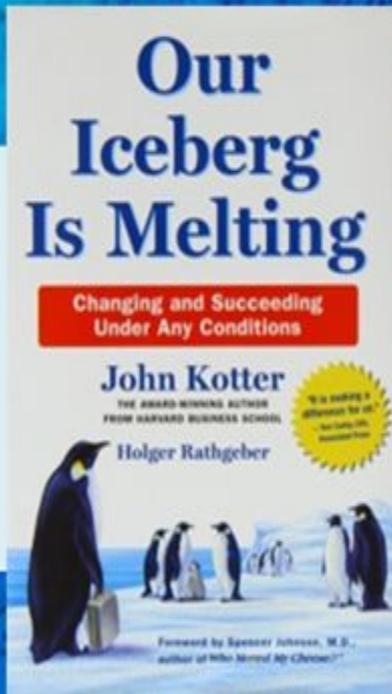
How Do We Make the Change Happen?

- We need to have a written plan and tactics that will clarify what needs to happen
- We need to align the efforts of the group in the implementation of the strategy
- Planning, team building, and leadership are essential components of effective change

A Fable about Doing Well in an Ever Changing World

Our Iceberg is MELTING

Book Summary



“Handle the challenge of change well, and you can prosper greatly. Handle it poorly, and you put yourself and others at risk.”

- John Kotter



READINGGRAPHICS
ACTIONABLE INSIGHTS IN ONE PAGE



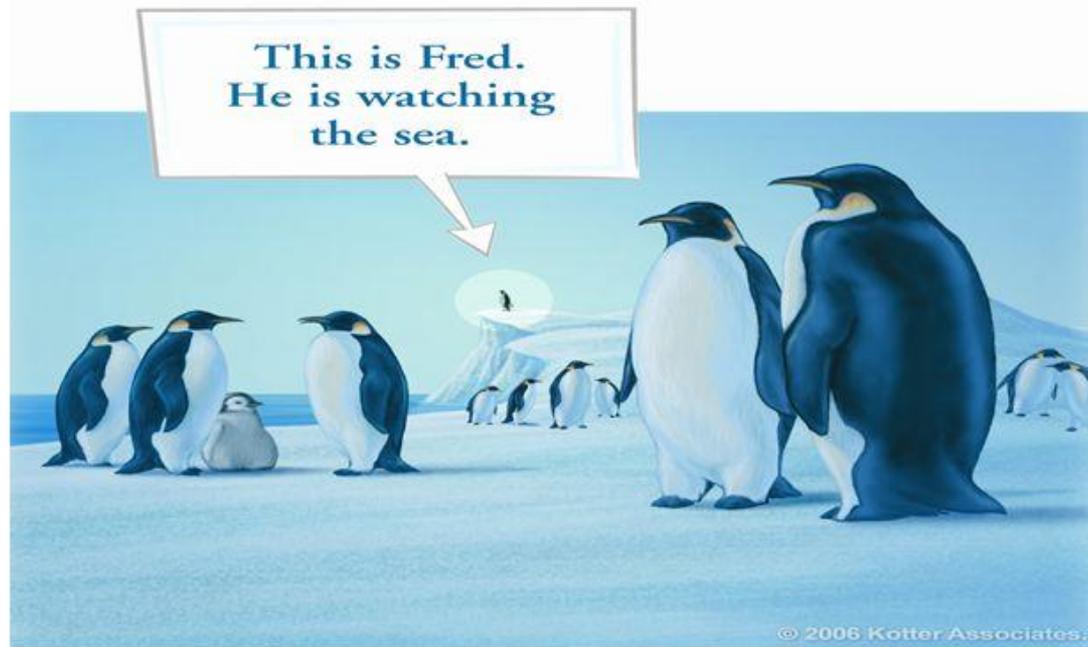
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TOGETHER

"Our Iceberg Is Melting"

A story about an iceberg colony whose future is uncertain



Our Iceberg Is Melting

- Simple fable
 - About doing well in an ever-changing world
 - About a penguin colony in Antarctica living for many years on their iceberg
 - One bird discovers a potentially devastating problem threatening their home



January 28, 2012

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Neumann Sachapow Sošková

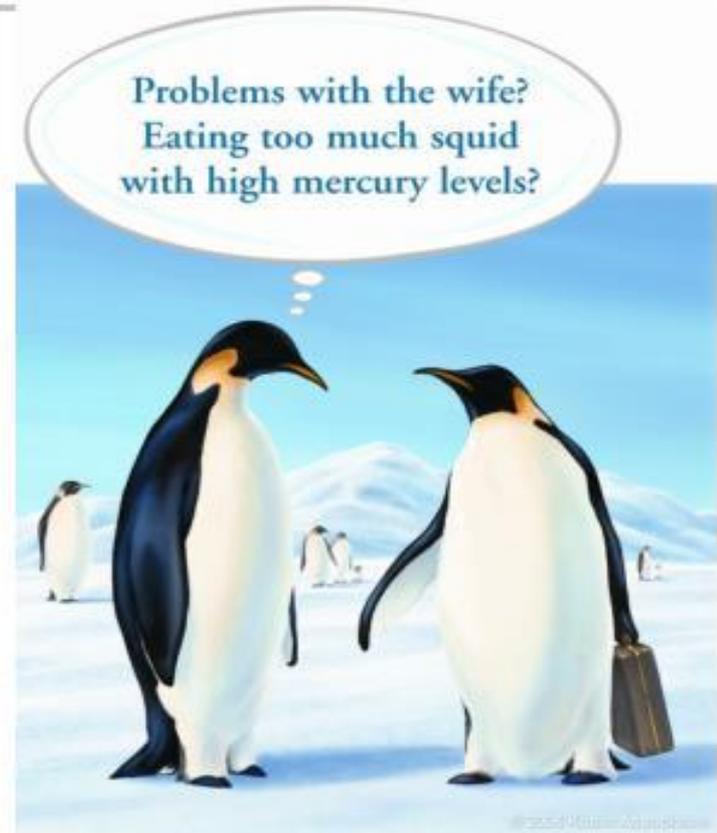
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"Our Iceberg Is Melting"

Fred seeks help of others to overcome complacency of the group



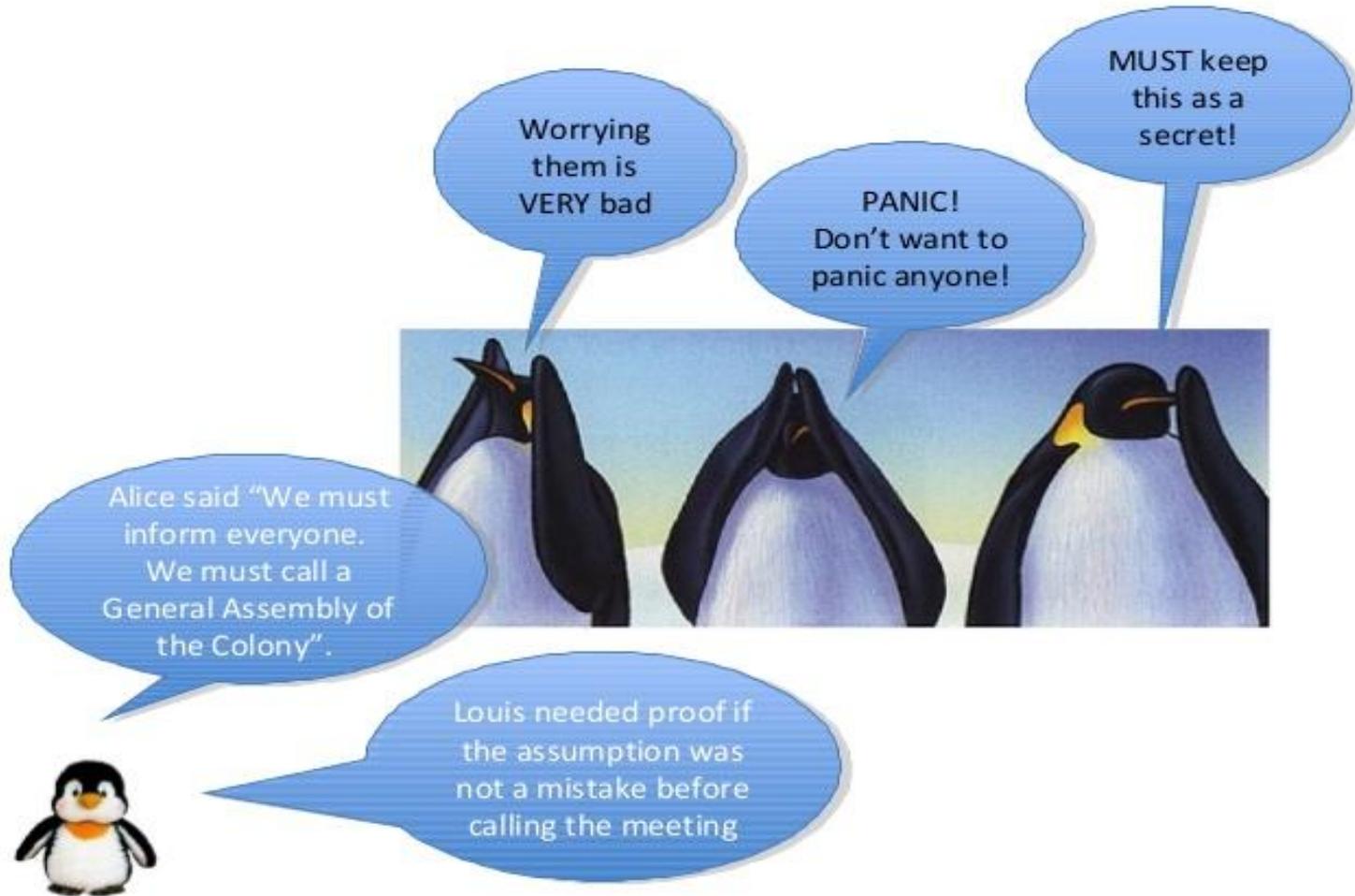
Hardly Unique

A Unique Cast of Characters

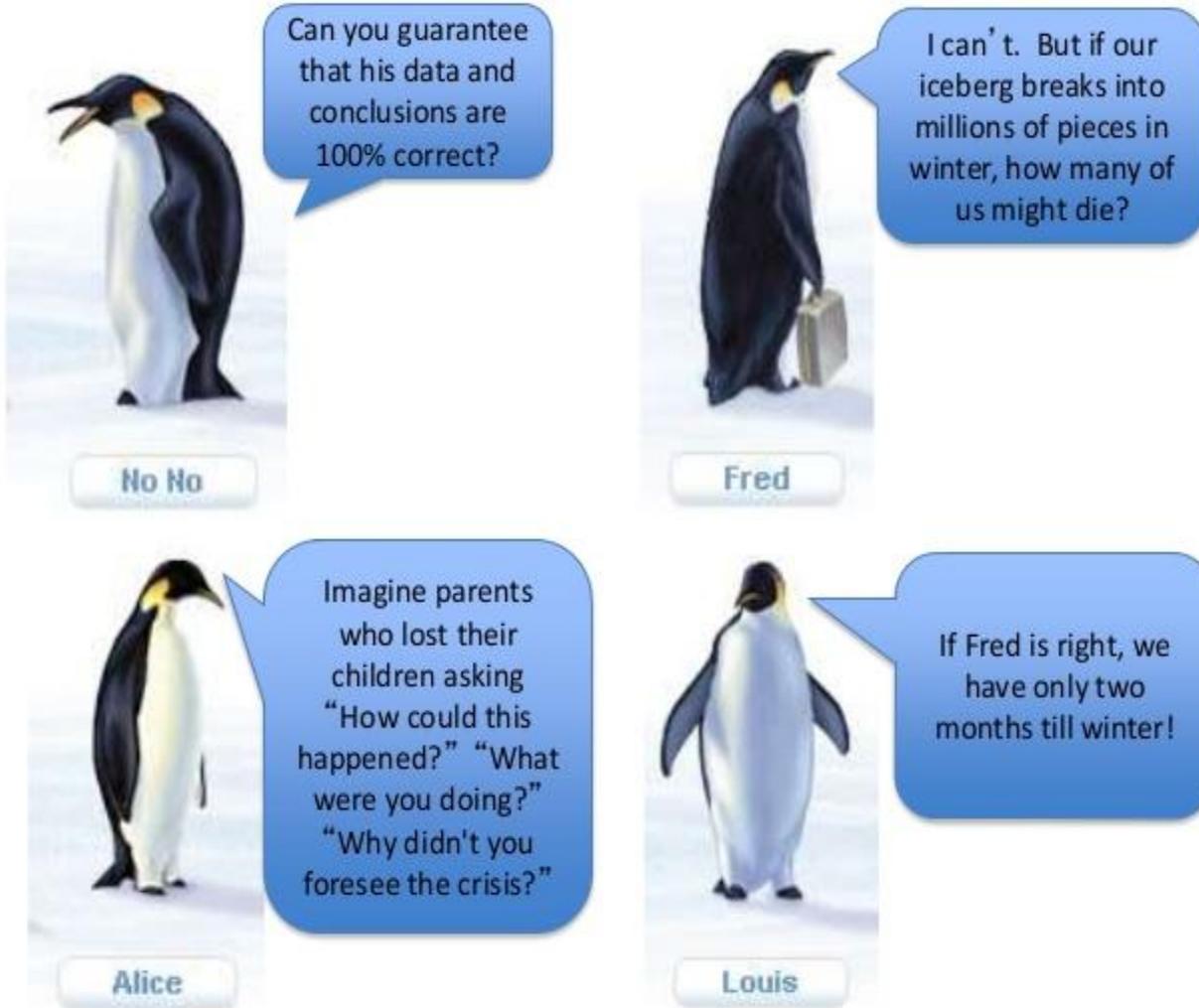


- **Fred**, the curious and observant
- **Alice**, a penguin boss, action-oriented
- **Louis**, the head penguin of the Penguin Leadership Council
- **Buddy** (storyteller, man of the people)
- **The Professor** (intelligent, scientific)
- **Sally Ann** (a young child/student in the colony)
- **NoNo** (the name says it all)

Chaos



The Meeting



8-Step Process for Leading Change

“To successfully react to windows of opportunity, regardless of the focus—innovation, growth, culture, cost structure, technology—a new methodology of change leadership is required.”

-- John Kotter

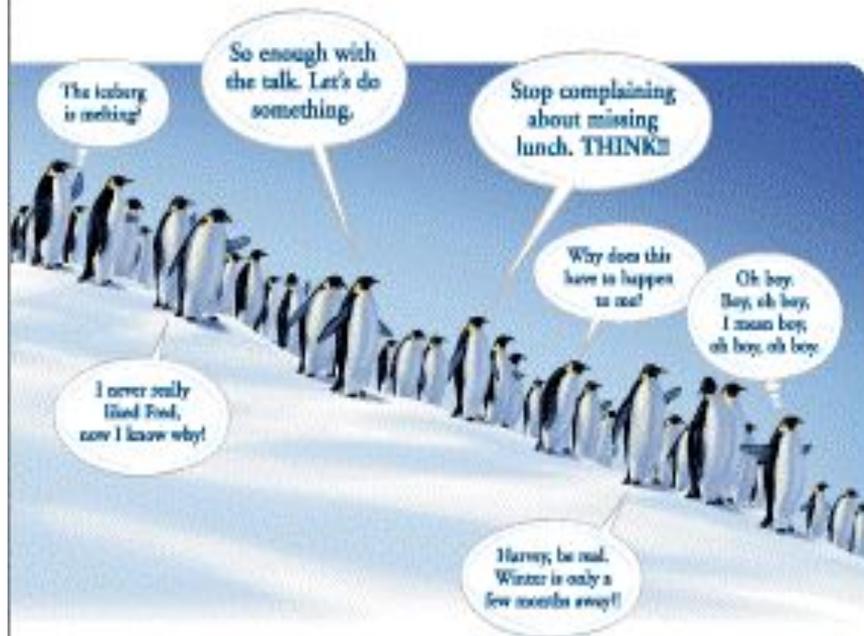


illustrations of.com #229939

step 1

Create a Sense of Urgency

Help others see the need for change and the importance of acting immediately.



© John Kotter and Holger Rathgeber

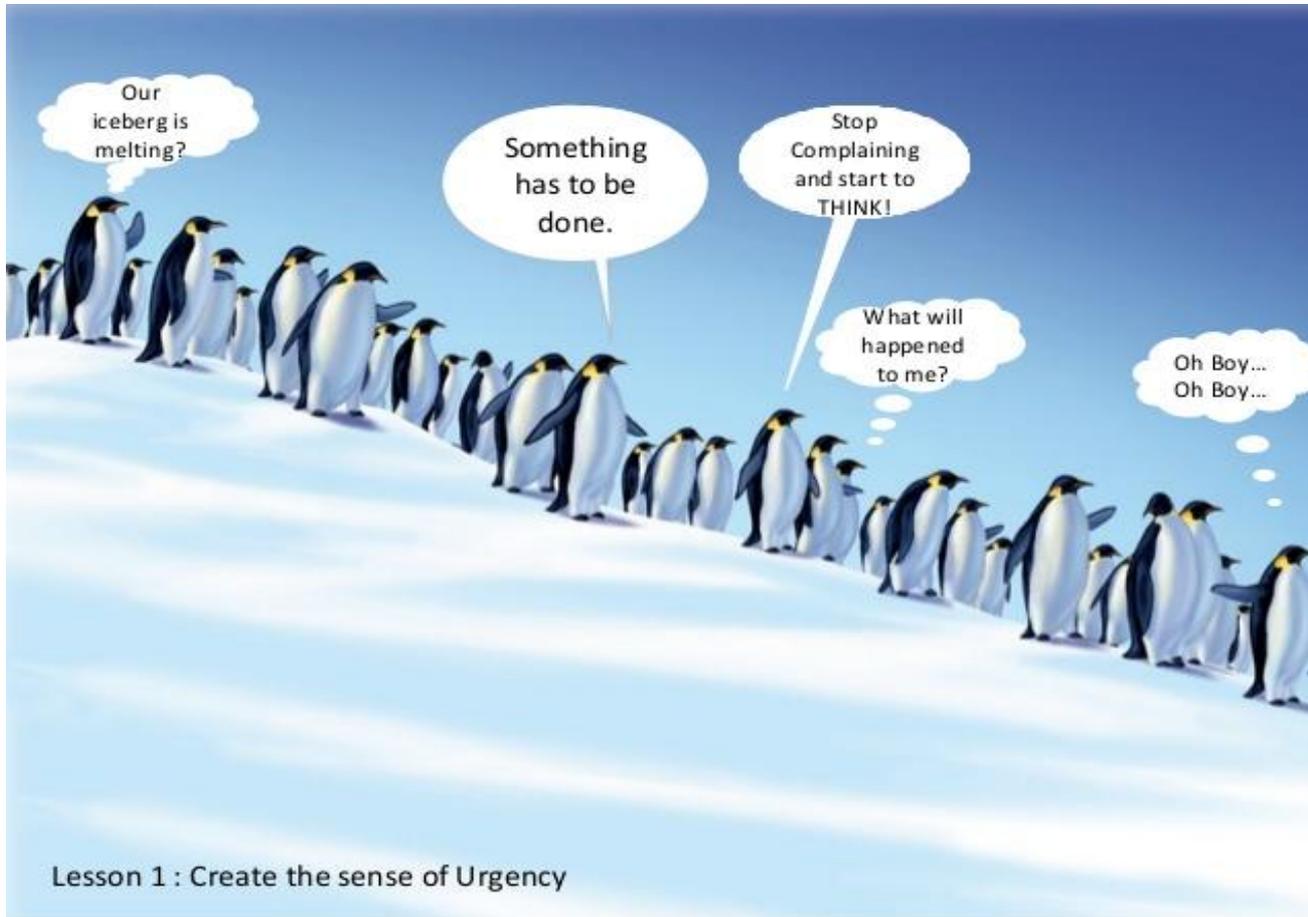
Set the Stage

Good Questions to ask

- Have we communicated the problem clearly to our colony or do we have a task force working on it behind closed doors trying to come up with a solution?
- Who are the NoNos in our colony with the attitude and power to keep people from acknowledging or addressing the problem? What are they doing to undermine our efforts?
- Despite all efforts, is our colony mostly concerned with catching fish for today or is it brutally clear to enough penguins that we must change and do something, now?
- If asked today, what percentage of the penguins of our colony, including the colony leaders, would agree that there is a major problem or missed opportunity? Is it high enough?

www.ouricebergismelting.com

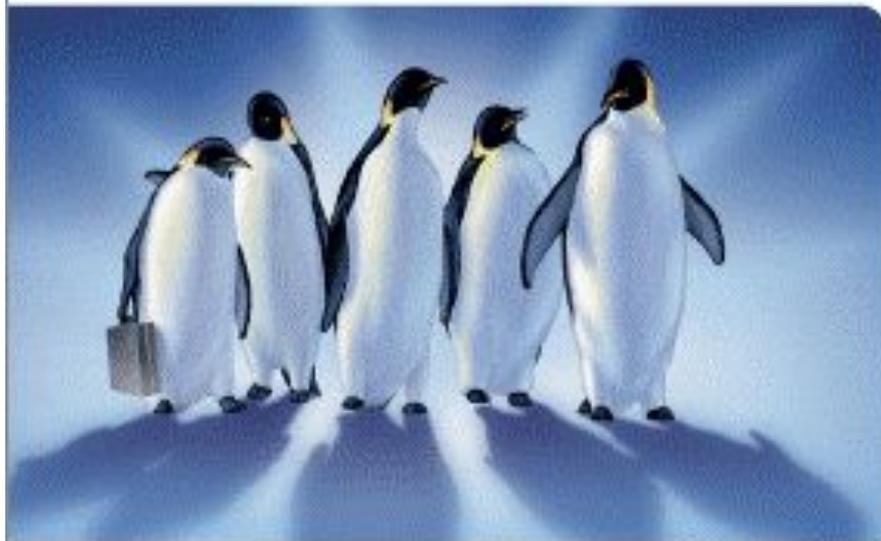
Create a Sense of Urgency & Opportunity



step 2

Pull Together the Guiding Team

Make sure there is a powerful group guiding the change—one with leadership skills, bias for action, credibility, communications ability, authority, analytical skills.



© John Kotter and Holger Rathgeber

Set the Stage

Good Questions to ask

- Have we assembled the equivalent talents of a Louis, Alice, Buddy, The Professor and Fred in our guiding team?
- Does our guiding team work well together or do they need to go for a squid hunt?
- Do we have penguins with egos as big as killer whales or even NoNos in our guiding team, eroding trust and energy?
- Is our guiding team working on project plans, budgets etc., or are they thinking about "Pointing East", the creation of a change vision and a strategy?

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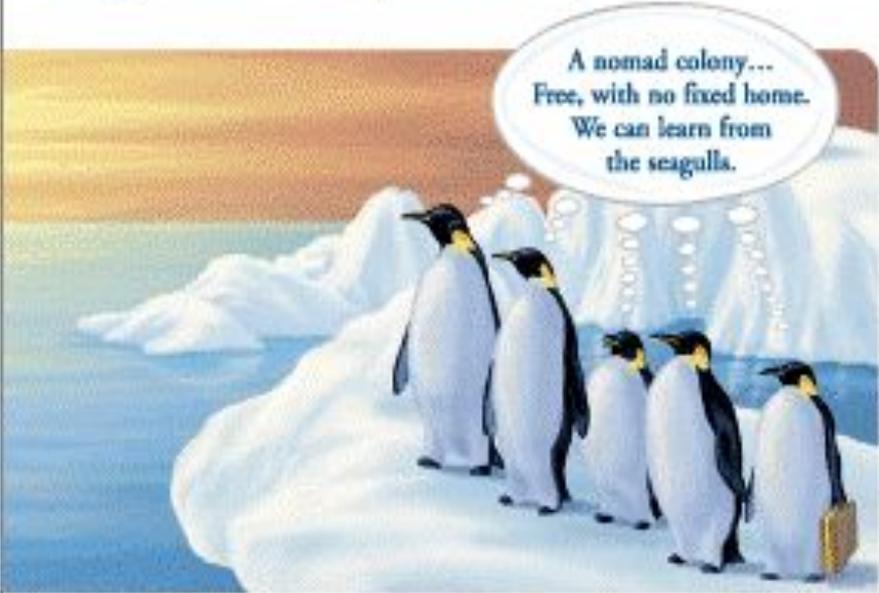


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step 3

Develop the Change Vision and Strategy

Clarify how the future will be different from the past, and how you can make that future a reality.



A nomad colony...
Free, with no fixed home.
We can learn from
the seagulls.

© John Kotter and Holger Rathgeber

Decide What To Do

Good Questions to ask

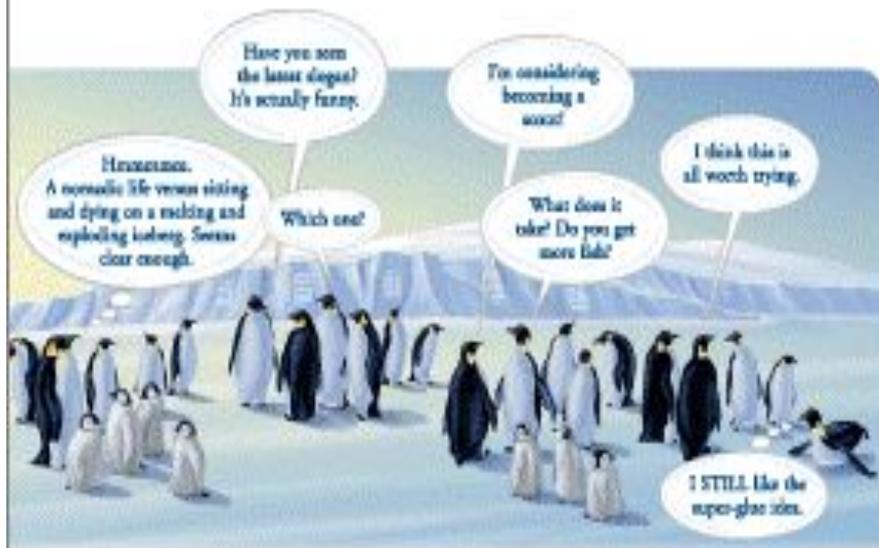
- Is our guiding team reaching out to other penguins? Do they walk around to pick up ideas or are they sitting in meeting rooms?
- In our situation, what would be the equivalent of a seagull? Is there a role model for change?
- Do we have a simple enough message for our change vision to be understood and remembered? Can we draw a sensible and appealing picture of what our future as nomads may look like?
- Is our change strategy a set of simple enough logical steps of how this future can be created, so that it has a chance to be understood and be remembered by our penguins?

www.ouricebergmelting.com

step 4

Communicate for Understanding and Buy-in

Make sure as many others as possible understand and accept the vision and the strategy.



© John Kotter and Holger Rathgeber

Make It Happen

Good Questions to ask

- Is it important to remind our colony on "Who we really are"?
- Can we tell an inspiring seagull story?
- What could be the equivalent of ice posters? Do we have enough penguins working on it? Where else can we put the posters, so that the colony cannot ignore them, even when they are annoyed?
- If asked today, what's the percentage of penguins in our colony who can see the new way and believe the idea has merit? Is it high enough?

www.ouricebergmelting.com

Five questions for better change communications



Have we explained what we are all about?

- Many communications programmes begin and end at this point.
- We need to make sure the news has reached people...
- ...but it's only the beginning.

Do we know if they understand?

- We need mechanisms for checking if the message is getting through.
- People need opportunities to ask questions and test what they are hearing...
- ...this is where local leaders start making the difference.

Have we excited them about it?

- What is the story that is going to really excite people?
- it's not just about the money; the vision matters.
- And people need to know, specifically, what they have to do differently.
- Have we removed the reasons to resist change?

Is the organization competent to deliver?

- Communications is not enough if your systems, procedures or management behavior tell a different story.
- You need to work with leaders to ensure they are credible and look at the real obstacles facing employees.

Does it feel like the right thing?

- How can we celebrate successes - large and small?
- How are you tracking all this?

step 5

Empower Others to Act

Remove as many barriers as possible so that those who want to make the vision a reality can do so.

But what about your nightmares?

Oh, they're gone. Now I'm going to help the colony. She said we could all help, Dad!

© John Kotter and Holger Rathgeber

Make It Happen

Good Questions to ask

- Who are our scouts? Do we have enough capable scouts that volunteer? Who else would be thrilled by the challenge?
- Now that change starts to become real and obstacles build up, is there something that sucks confidence and attention away from our vision and strategy?
- Do we have a plan to deal with crying kindergarteners, NoNo and NoNos' converts, the infighting among leadership team members and the we-can't-both-prepare-for-winter-and-feed-scout crowd?
- Which old rules that are in the way of making change happen need to be bent or abandoned ?

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step 6

Produce Short-Term Wins

Create some visible, unambiguous successes as soon as possible.



Make It Happen

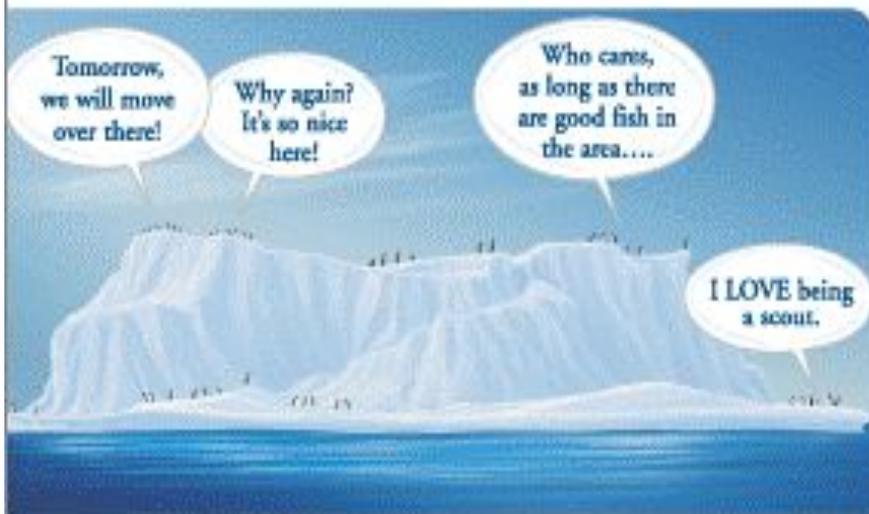
Good Questions to ask

- Have we planned for the scouts' success, something safe and not too demanding to win? Is there enough support for them to win?
- Have we communicated clearly that everyone can help?
- Can we organize the equivalent of a "tribute for our heroes" day that clearly communicates that we will prevail?
- Have we thought of publicly recognizing the contributions of our change heroes--- the scouts and our youngster hero?

step 7

Don't Let Up

Press harder and faster after the first successes. Be relentless with instituting change after change until the vision is a reality.



© John Kotter and Holger Rathgeber

Make It Happen

Good Questions to ask

- Have we raised the bar enough for our 2nd wave scouts?
- Have we found a new iceberg to move to? Is the colony ready for the move?
- Which meetings and other routines are irrelevant and can be eliminated to avoid exhausting ourselves along the way?
- Are we allowing urgency to sag? What else could we do to keep the momentum up?

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8 Steps (cont.)

Make It Stick

8. Create a New Culture

- New behaviors replace old traditions

Our Iceberg is Melting



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TOGETHER

Organizational Culture Is Important to Moving Forward

- Openness to new ideas and ways of doing things
- Failure triggers investigation and analysis
- Promotion of innovation and creativity
- Cross functional teams
- Members who lead by example
- Flexibility of rules, processes, and procedures that can be adapted to suit the situation
- Positive attitude – start believing success will be achieved

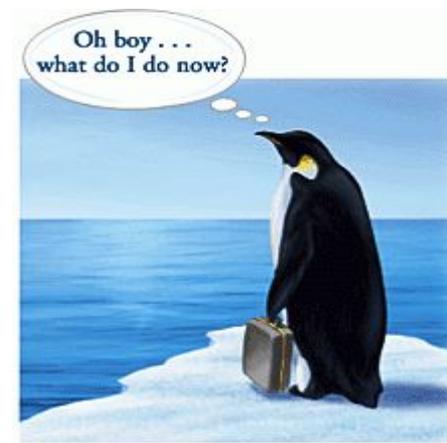
Characteristics of organization's culture.

Seven characteristics that capture the essence of an organization's culture:

1. Innovation and Risk Taking;
2. Attention to Detail;
3. Outcome Orientation;
4. People Orientation;
5. Team Orientation;
6. Aggressiveness;
7. Stability.



Is YOUR Iceberg *Melting*?



- What is your iceberg? Is it melting?
- Are there fissures or caves? What fissures do you see?
- Does your organization have enough scouts?
- Are the “NoNos” controlling the organization?
- Are you most concerned with success in catching fish today or planning for what may come tomorrow?
- Do you have a visible example of the case for change?
- Is there a clear & simple message about the future and what it may look like that is understood by all?
- Is anyone willing to swim ahead?

**The art of progress is
to preserve order amid
change and to preserve
change amid order.**

QUOTEHD.COM

Alfred North Whitehead
English Mathematician

The “PASSION METER” Measures Receptiveness to Change

Rather than guessing how receptive people are to a change, we find it is sometimes better to ask them directly.

One approach to use is a tool called the passion meter.

A passion meter can be as simple as asking people how they feel about the change: “red light, yellow light or green light?”

The “PASSION METER”

*Negative Skeptics

*Positive Skeptics

*Cautious Fence Sitters

*Indifferent Fence Sitters

*Promoters

*Sponsors



Denial

- Change doesn't sink in
- Disbelief/Numbness
- Withdrawal
- Question the change
- Work as usual

Commitment

- Feel comfortable with the change/accept new roles
- Focus on the future
- Set new goals
- Build action plans

Resistance

- Negativity/pessimism
- Expression of emotions
- Focus on personal impact
- Absences increase
- Productivity dips

Exploration

- Experiment/Take risks
- Seek information/answers
- Generate new ideas
- Distraction/Stress
- Uncertainty/Excitement





**Change is a process,
not an event.**



BETTER THE
JUNIOR
LEAGUE
TOGETHER

Phases of Transition

1. Figure out what is actually changing
2. Decide what is really over
3. Identify continuities
4. Look at the process- the “new” process creatively
5. Experiment a little everyday

Pay Attention!



- As soon as you sense something should change, pay attention.
- Denial at this point virtually guarantees your path will be longer and harder than needed.
- The sooner you acknowledge the shift, the easier it will be to adjust to the change.
- The most predictable way to get a new sense of the future is to ask yourself new questions.

Focus On:

- Acknowledging that changes are happening in the League?
- Being sure you are seeing the change in its broadest implications
- Connecting the change with the League's everyday reality—how will members and other “customers” partners be impacted?
- Getting the support you need to make it through
- Creating a safe environment
- Not becoming angry and/or sad
- Holding celebrations to honor what's being left behind



At the Same Time Avoid

- Denying that change is occurring
- Jumping at the 1st option/distraction that shows up
- Being a lone ranger and trying to do it all alone



Yesterday's Strategies Are *NOT* Effective FOR THE FUTURE



It's a New Day!

A black and white photograph of Eleanor Roosevelt, an elderly woman with short, curly hair, wearing a dark sweater and a pearl necklace. She is pointing her right hand towards a large document she is holding up. The document is the Universal Declaration of Human Rights, with the title 'DECLARACION UNIVERSAL DE los Derechos del Hombre' visible. The United Nations logo is at the top. The quote 'WITH THE NEW DAY COMES NEW STRENGTH AND NEW THOUGHTS.' is overlaid in large, white, bold, sans-serif capital letters across the center of the image.

**“WITH THE NEW DAY COMES NEW STRENGTH
AND NEW THOUGHTS.”**

ELEANOR ROOSEVELT

© Lifehack Quotes

**LET'S TALK ABOUT *IT*
& DO SOMETHING**

with

VICKI CLARK



The Capacity of Organizations

**THERE IS NO TOOL
FOR DEVELOPMENT
MORE EFFECTIVE
THAN THE
EMPOWERMENT OF
WOMEN**

-Kofi Annan

thank you

Keep in touch

vickiclarkconsulting.com

@vickiclarkconsulting



BETTER THE
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Change Style Indicator[®]

February, 2020

Vicki Clark, facilitator

Building the Capacity of Organizations

Memphis, TN



NAVIGATE

"It is not the ship so much as the skillful sailing
that assures the prosperous voyage."

- George William Curtis

CHANGE STYLE PREFERENCE

CONSERVERS

Accept the
structure

Prefer change
that is
incremental

PRAGMATISTS

Explore the
structure

Prefer change
that is
functional

ORIGINATORS

Challenge the
structure

Prefer change
that is
expansive

CHARACTERISTICS

When facing change

CONSERVERS

- Generally appear deliberate, disciplined, and organized
- Prefer change that maintains current structure
- May operate from conventional assumptions
- Enjoy predictability
- May appear cautious and inflexible
- May focus on details and the routine
- Honor tradition and established practice

CHARACTERISTICS

When facing change **ORIGINATORS**

- May appear unorganized, undisciplined, unconventional and spontaneous
- Prefer change that challenges current structure
- Will likely challenge accepted assumptions
- Enjoy risk and uncertainty
- May be impractical and miss important details
- May appear as visionary and systemic in their thinking
- Can treat accepted policies and procedures with little regard

CHARACTERISTICS

When facing change

PRAGMATISTS

- May appear practical, agreeable, flexible
- Prefer change that emphasizes workable outcomes
- Are more focused on results than structure
- Operate as mediators and catalyst for understanding
- Are open to both sides of an argument
- May take more of a middle-of-the-road approach
- Appear more team-oriented

PERCEPTIONS

ORIGINATORS see **CONSERVERS** as:

- Dogmatic
- Bureaucratic
- Yielding to authority
- Having their head in the sand
- Preferring the status quo
- Lacking new ideas

PERCEPTIONS

CONSERVERS see **ORIGINATORS** as:

- Divisive
- Impulsive
- Lacking appreciation of tested ways of getting things done
- Starting but not finishing projects
- Not interested in follow through
- Wanting change for the sake of change
- Not understanding how things get done

PERCEPTIONS

PRAGMATISTS can be perceived by strong
CONSERVERS and **ORIGINATORS** as:

- Compromising
- Mediating
- Indecisive
- Easily influenced
- Noncommittal
- Hiding behind team needs

Collaboration

CONSERVERS

Prefer to keep
current structure
operating smoothly

Focus on
the task

Encourage building
on what is already
working

PRAGMATISTS

Prefer balanced
Inquiry

Focus on the
relationships

Encourage looking
at the current
circumstances

ORIGINATORS

Prefer to challenge
accepted structure

Focus on
the outcomes

Encourage exploring
new possibilities

CREATIVITY

CONSERVERS

PRAGMATISTS

ORIGINATORS

Verification

Perspiration

Inspiration

Refine

Concretize

Conceptualize

**Follow
through**

Implement

Initiate

Style Summary

Conservers

CONTRIBUTIONS TO THE ORGANIZATION

- Get things done on schedule
- Work well within organizational structure
- Attend to detail and factual information
- Demonstrate strong follow-through skills
- Encourage and adhere to routine
- Respect rules and authority
- Handle day-to-day operation efficiently

LEADERSHIP STYLE

- Lead through reliable, stable, and consistent behavior
- Reward following the rules while getting the job done
- Attend to practical organizational needs
- Expect organizational policies, procedures and rules to be followed
- Promote the traditional values of the organization

Style Summary

Conservers

PREFERRED WORK ENVIRONMENT

- Secure
- Steady and consistent pace rewarded
- Time and space for reflection
- Stable, structured, orderly, and predictable
- Group oriented problem solving and decision making

POTENTIAL PITFALLS

- May be rigid in thought and action
- May discourage innovation by promoting existing rules, policies and regulations
- May not see beyond the present details to understand the broader, strategic context
- May delay completion of tasks because of perfectionism
- May delay action by reflecting too long on a situation
- May appear unyielding and set in their ways
- May overly focus on small details and inconsistencies

Style Summary

Pragmatists

CONTRIBUTIONS TO THE ORGANIZATION

- Willing to address the needs of the organization as they arise
- Get things done in spite of the rules, not because of them
- Negotiate and encourage cooperation and compromise to get problems solved
- Take a realistic and practical approach
- Draw people together around a common purpose
- Organize ideas into action plans
- Have short- and long-range perspectives
- Promote practical organizational structure

LEADERSHIP STYLE

- Facilitate problem solving among people
- Use and adapt past experiences to solve current problems
- Build cooperation rather than expecting it
- Use a facilitative approach in managing people and projects
- Encourage the organization to have congruence between values and actions

Style Summary

Pragmatists

PREFERRED WORK ENVIRONMENT

- Flexible and adaptable
- Harmonious and participative atmosphere
- Action-oriented, productive people who focus on the situation at hand
- Hands-on experiences encouraged
- Adaptive structure that is responsive to the needs of the moment

POTENTIAL PITFALLS

- May appear indecisive and undirected
- May not promote ideas and priorities enough
- May try to please too many people at the same time
- May appear noncommittal
- May be easily influenced
- May negotiate compromise that is too “middle of the road”

Style Summary

Originators

CONTRIBUTIONS TO THE ORGANIZATION

- Understand complex problems
- Bring strong conceptual and design skills
- Push the organization to understand the system as a whole
- Support and encourage risk-taking behavior
- Provide future-oriented insights and vision for the organization
- Serve as catalysts for change
- Initiate new ideas, projects, and activities

LEADERSHIP STYLE

- Catalysts for systemic change
- Energetic and enthusiastic
- Provide long-range vision to the organization
- Conceptualize and build new models
- Constantly reorganize the whole system
- Like to be in charge of the start-up phase
- Prefer unique leadership roles to conventional roles
- Manage more than one task at the same time

Style Summary

Originators

PREFERRED WORK ENVIRONMENT

- Working independently on models to solve complex problems
- Change and risk oriented
- Non-bureaucratic, unconstrained by rules and policy
- Idea oriented and intellectually challenging
- Focus on long-range, strategic planning
- Multiple tasks to work on simultaneously

POTENTIAL PITFALLS

- May not adjust their vision to the facts, logic, and practical constraints of the situation
- May become lost in theory, ignoring or forgetting current realities
- May over extend themselves
- May not adapt well to policies and procedures
- May appear unyielding and discourage others from challenging them
- May ignore the impact of their ideas on the system and other people
- May move on to new ideas or projects without completing those already started
- May overlook relevant details

Questions for Assessing Situational Appropriateness of Change Style

- How many solutions have been tried already?
- How critical is time?
- How limited are resources?
- How critical is the situation?
- How long has the team worked together?
- Are politics playing a part in the situation or decision?
- Who is requesting the change?
- Is the person a conserver, a pragmatist, or an originator?
- In what stage of development is the project?
- Is the project of a short- or long-term nature?
- Has the competition changed?
- Are you facing crisis?

Suggestions for Increasing Flexibility and Avoiding Style Traps

In General

- Consult with a person you believe to have a change style different from yours before proceeding.
- Make efforts to understand the perspectives of those with styles other than your own.
- Imagine putting on a hat of another style.
- Solicit feedback and suggestions.
- Step back and be aware of your initial reaction in a situation, especially when you are aware of having an emotional response.

Suggestions for Increasing Flexibility and Avoiding Style Traps

Conservers

- Consider at least three alternatives before making a decision.
- Remember to pay attention to the wider ramifications of problems in addition to present realities.
- Think of the “big picture” consequences of actions. Ask others to explain them if necessary.
- Find an originator you respect and ask his or her perspective.
- Specify a time frame in which the decision will be made or the action taken.
- When time is critical, identify no more than three or four criteria for deciding who should be included in framing your decision.
- Develop tools and strategies for exploring and understanding system oriented issues.
- Find someone who is willing to play devil’s advocate with your proposed solutions/ideas.
- Write a list of advantages for taking more of an originator-type approach in a given situation.
- Write a description of a desired future outcome in positive and global terms.

Suggestions for Increasing Flexibility and Avoiding Style Traps

Pragmatists

- Specify a period of time in which to consider alternatives prior to committing to a solution.
- Imagine the consequences of your decision on someone for whom you care.
- When dealing with strong conservers or originators, ask exploratory questions about emotional responses to a situation, for example,

How do you feel about this? How would you like things to be?

- Identify a person you suspect to be a strong conserver and a person you believe to be a strong originator and solicit their opinions.
- Identify decision criteria and apply the criteria to each possible solution.
- Identify specific questions to ask conservers and originators.

Suggestions for Increasing Flexibility and Avoiding Style Traps

Originators

- Wait a day before taking action.
- Find someone you suspect of being a conserver and ask for his or her perspective.
- Identify and try to understand at least five facts related to the situation, problem, or decision.
- Explore and understand what is already working in the current situation.
- Learn to give up on an impractical idea.
- Attempt to clearly understand the impact of the decision or action on at least two other people.
- Find someone who is willing to play devil's advocate on a given topic or decision.
- Write a list of advantages for taking more of a conserver-type approach.
- Make a list of relevant facts and details.
- Learn to screen activities rather than attempting all that is initially appealing.

“The pessimist complains about the wind; the optimist expects it to change; the realist adjusts the sails.”

-William Arthur Ward

Breakout Groups

20 minutes

Breakout Groups

1. You will randomly be put into small groups
2. Introduce yourself with your name + League name
3. Choose a prompt to discuss:
 - *What have attendees discovered this past year in operating differently?*
 - *What might Leagues keep in the future based on changes adopted or adjustments made and why?*
 - *How will Leagues navigate the duality of a “new normal” after COVID with being in-person and virtual?*

You will be brought back to the main room in 20 minutes

League Bring + Brag

25 minutes

What's Going Well

- Member Engagement & Retention
- Unique & Engaging Socials
- Done-In-A-Day (DIAD) with community partners
- Partnering with grant recipients
- Recruitment – finding members far & wide



 JUNIOR LEAGUE OF
NAPA-SONOMA

What We've Learned

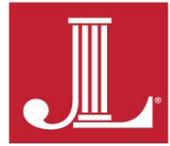
- We won't stop being *Unstoppable*
- Onboarding – ensuring new members are involved from day 1
- Online Training & Modules – making it quicker & easier to join
- Communications – Recruitment events through Facebook & Instagram, virtual zoom events



 JUNIOR LEAGUE OF
NAPA-SONOMA



2020-2021



SACRAMENTO

What's Going Well

- Membership: we had an increase, with a great Provisional classes and retention
- Sacred Cows: great time to look at some “sacred cows” - did a League-restructuring to right-size
- Trainings: so many training options through AJLI and other Leagues - more than ever!
- Awarded D&I Accelerator Grant
- Traditions: found new ways to still keep old traditions

What We've Learned

- Options: our members liked having options for participating in GMMs, meetings
- Patience: everyone all doing their best to keep up with new rules and guidelines and tiers and colors
- Connection: while we are doing our best to connect - there really isn't any substitute for being together
- Challenging: our members are looking for more challenges in our focus area, getting out of their comfort zone

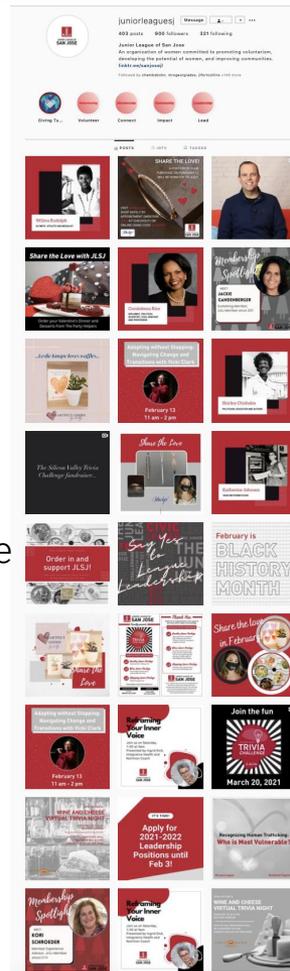


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2020-2021

What We've Learned

- We can't force a feeling of engagement even if members attend events
- For every person who doesn't feel engaged, someone else feels even more engaged
- We have gained new organizational competencies and skills while navigating virtual operations
- We can be flexible in the future (in person + virtual opportunities)
- We would rather have vacancies than people reluctantly accept leadership roles



What's Going Well



- Endowment Fund: \$2M
- New Giving Campaign: \$7k
- Sponsorship Goals Exceeded



- Community Grants: \$20k
- College Scholarships: \$10k
- Virtual Volunteer Opportunities
- 101 College Care Packages Given



- DEIB Task Force Kicked Off
- New 2020-2024 Strategic Plan
- Successful Social Media Revamp
- 475% more members @ AJLI Confs
- First Women's Leadership Summit 3/13

*Cheers to
55
Years!*

We turn 55 in 2021-2022!

2020-2021

What's Going Well

- 90x90 Campaign
- Successful Virtual fundraising – over \$35,000 raised through small fundraisers and grants at mid year
- Hosted virtual LUNAFEST our primary fundraiser
- Expanded Training opportunities through AJLI and other Leagues
- Increased attendance at GMMs due to virtual platform
- Increased sustainer participation at In-League Trainings
- Community Impact by offering virtual activities to our partners
- Offering virtual New Member Info Sessions

What We've Learned

- We will continue to be flexible offering both in person and virtual opportunities
- We've gained new skills having to pivot to virtual meetings and trainings
- We need to find creative ways to enhance engagement.

2020-2021



JUNIOR LEAGUE OF ORANGE COUNTY, CA

What's Going Well

- Hosted a *virtual* 2020 CalSPAC Conference
- Launched a DEI Task Force and have infused DEI at all GMMs
- Created the League's first ever Annual Guidebook
- Innovative fundraising efforts resulted in the Self-Care Series (and our most successful LBDI!)
- Developed our first training track
- Launched JLOCC Spirit Week (great participation, including sustainers)
- Implementing AJLI's Placement Matching Tool & New Membership Model/Transformation; eliminating PDI points and adding Member Compact, an Opt-In Calendar & Opt-In Mentorship program
- Established Business Continuity & Emergency Response Procedures
- Reinvigorated our 1956 Society
- Increased member participation, including Sustainers
- Sent 10 members to SWX and sending 10 to Winter Conference

What We've Learned

- According to recent Annual Member Survey results, our members feel *more* connected to the League in general
- Members desire greater community engagement
- Members value increased accessibility and convenience of virtual offerings, which has also lead to greater productivity for some committee work

SHE IS *Resilient*

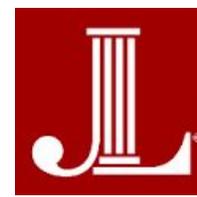
a conference by  JUNIOR LEAGUE OF
ORANGE COUNTY, CA

March 6, 2021 / 10:00am - 12:00pm / \$30 for all JL members



BETTER
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TOGETHER

2020-2021



JUNIOR LEAGUE OF
**MONTEREY
COUNTY**

What's Going Well

- New Community Partners
- Virtual Meetings
- Membership outreach
- New DEI Task Force
- Self-Care Education
- Virtual Social Events
- Increased Training at GMMs
- Offering winter conference to all members
- Provisional class size

What We've Learned

- Our community wants us to be involved in their projects
- Our members like the flexibility and convenience of virtual offerings, including social interaction
- We would benefit from fundraising diversification

2020-2021



What's Going Well

- Recruited 33 new members via Virtual engagement
- Created social-distanced volunteer opportunities
- Increased Sustainer engagement with virtual GMMs
- Upgraded to new Member Essentials using the Mobile app to increase engagement.
- Hosting our Spring Event, Bloom, 100% outside



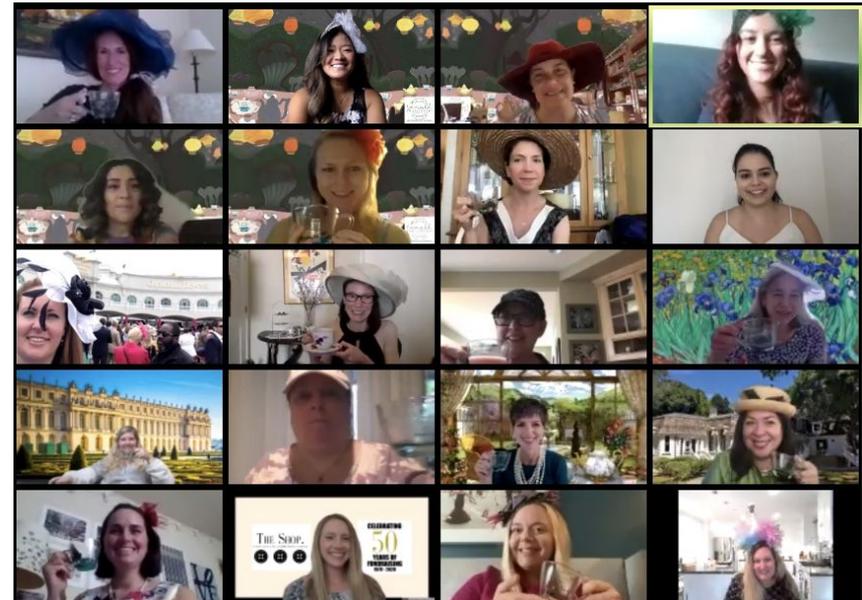
2020-2021

What's Going Well

- Our Upscale Resale Shop - our biggest fundraiser - is open
- Breakout Rooms at our GMMs and Member Training events
- Monthly virtual Done In A Days with a variety of Community Partners
 - Anti-Racism Book Discussions for Teens and Tweens
 - Crafting Cards for Meals on Wheels
 - Resource Area for Teaching Translate Opportunities
- Weekly communications and Member updates
- New DEI Affinity Group established
- A growing New Member Class

What We've Learned

- Practice Grace and Kindness daily
- Building the plane as we fly is the best option in changing times
- We have been around 125 years. Cheers to 125 more!



2020-2021



JUNIOR LEAGUE OF
FRESNO

What's Going Well

- Senior Girl Athlete 2021 KSEE May 5, 2021 - Broadcast honoring 26 female athletes
- Awarded \$10,00 Grant
- Podcast Recruitment - 4 New Members
- 110 SWAG Bags back to school w/ Junior League Face Mask
- Pies provided at Thanksgiving for Foster Youth Group Homes
- Monthly UPDATES
- Christmas gifts for Foster Youth
- Increased number of members attending trainings
- 4 Sustainers and 3 Actives - 21 Day Racial Training

What We've Learned

- Be Patient with one another
- Give each other Grace
- Be Flexible and Be in the Moment



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Closing

5 minutes

BETTER THE
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Join us April 10th for

Knowledge Transfer

Successful Role Transitions

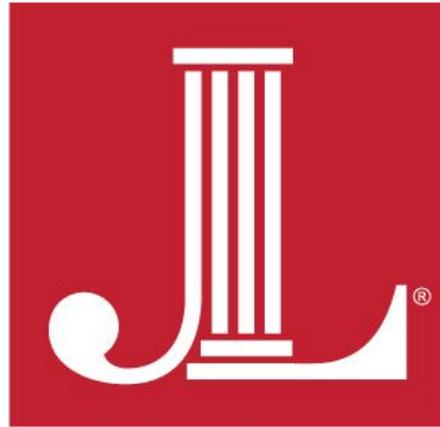
presented by Vicki Clark

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Thank You!

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**CIVIC
LEADER**

THE JUNIOR LEAGUE

**CHALLENGING
THE STATUS QUO
SINCE 1901**

**CHALLENGING
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