

# **The Jewish Federation Valley Alliance Staff Development Proposal Spring 2002**

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## Purpose & Overview

This is a *Staff Development Proposal* for The Jewish Federation Valley Alliance and serves two purposes. The initial purpose is to fulfill the research requirement expected of all Masters degree candidates for the HUC-JIR School of Jewish Communal Service. The secondary purpose of the paper is more practical in nature, hopefully serving as a useful tool for The Valley Alliance to help facilitate the advancement of its mission and achievement of articulated organizational goals.

Contents of the paper include *Theoretical Framework*, *Construction of the Questionnaire*, *The Jewish Federation Valley Alliance*, *Findings of the Data*, and *The Proposal*. The first section explores and orients the reader with the theoretical framework used for the research project. This section is followed by a discussion of the questionnaire used to assess the quality of leadership and management of The Valley Alliance, and provides an explanation of the correlation between the questions and the theory. This will be followed by an overview of the organizational structure of The Valley Alliance, and will include a description of the staff composition, department and committee structures, and current environmental conditions affecting the work setting.

The next section, *Findings of the Data*, is an in-depth look at the results of the questionnaire data and includes a discussion regarding the quality of leadership and management, and the related implications. The final section, *The Proposal*, is a set of suggested intervention strategies that were designed to address identified system barriers highlighted in the *Findings of the Data*. This section includes the overarching goal of the proposal, core objectives, process objectives, suggested areas of focus, and an

implementation timeframe. We now turn and take a closer look at the theoretical framework used for the project.

## **Theoretical Framework**

The theoretical framework used for this research project was derived from Robert Blake and Anne McCanses' *Leadership Dilemmas – GRID Solutions*, a visionary look at a classic tool for defining and attaining leadership and management excellence. Built on the foundations of Blake and Mouton's best-selling management classic *The Managerial Grid*, Blake and McCanses fuse Grid theory with workplace realities that lend greater insight into more comprehensive and effective forms of application that have been proven successful. The following is an overview of Grid theory and will include subcomponents such as leadership dynamics, the Grid framework, and dimensions of team building.

### ***Leadership Dynamics***

*What exactly is leadership?*

In addition to describing leadership as having the ability to inspire or accurately prescribe solutions to problems, Blake and McCanse simply define leadership as the ability to transform *resources* (R1) into *results* (R3) through *relationships* (R2) (See Figure 1). How a leader operates in these three arenas can make the difference between organizational success and failure. *Resources* (R1) are defined as what individuals have to contribute. They are the human resources that provide "knowledge, abilities, skills, and motivations people have available in using technical, financial, and other non-human or indirect resources" (Blake & McCanse, 1991, pg. 2). *Relationships* (R2) are the

interactions between people, whether among “co-workers or different departments and in relations with customers, clients, or whomever one deals with in day-to-day interactions” (pg. 3). *Results* (R3) are realized from team interaction and problem solving. They are measured in terms of “productivity, profit, creativity and innovation, sales, and service,” and ultimately “measure the degree to which organizational purpose is met” (pg. 3).

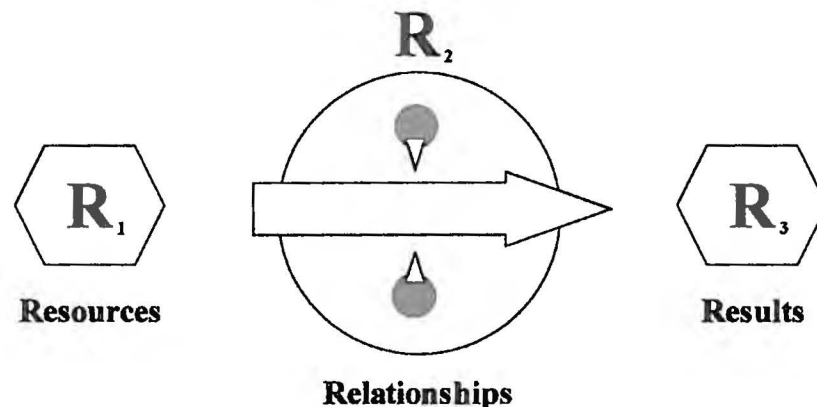


Figure 1. The three Rs of leadership

### *The Effective Leader*

Blake and McCaule explain that too often we rationalize being beaten by a competitor, saying, “They just got lucky,” “Their financial resources are better,” or “They’ve got the latest technology; we were at a disadvantage” (pg. 3). In other words, we justify our failures by blaming others instead of looking at what we can influence – our own interactions. The effective leader is one who can convert resources into results in working with and through others by establishing and maintaining sound relationships. When  $R_2$  (Relationships) is operating in a sound manner,  $R_1$  (Resources) flows into  $R_3$  (Results), which solidify in the form of concrete results. More often than not, the root of problems lie in the relationship arena ( $R_2$ ) where people’s resources are not utilized effectively and efficiently, and instead are blocked or diverted.

It is often the case that extremely talented people are not able to produce the results needed for success. When taking a closer look at these individuals, the cause is frequently faulty relationships (R2). They may have an abundance of resources (R1) at their disposal, but are repeatedly “unable to establish constructive relationships (R2) with those who must help produce the results (R3)” (pg. 4). The solution is “recognizing the adverse consequences of one’s leadership – those things a person does that negatively impact others or those things a person fails to do that, if done, could prove to be beneficial” (pg. 4). Once people have an objective view of how they operate, change toward more effective behavior becomes an option. In other words, “as long as we continue to do things unconsciously and that adversely affect teamwork and organization productivity, little or no change can occur” (pg. 5).

### *Elements of Leadership*

Because leadership is a complex process, Blake and McCauley define six key elements to assist with the analysis process. These elements are *conflict solving*, *initiative*, *inquiry*, *advocacy*, *decision-making*, and *critique*. All six elements are vital in exercising effective leadership and teamwork. It is important to remember that each element is “a facet of the whole and that all operate in concert with one another. In other words, each element can be likened to one facet of a brilliant gem; we can examine each facet individually, but it cannot be realistically separated from the other five. There is an implied interdependency and no one element stands alone” (pg. 17). Furthermore, due to the “closeness” of each element some degree of overlap may occur when examining them in the context of relationships. The following is a brief description of each element of leadership.

**Conflict Solving:** Conflict can be either disruptive/destructive or creative/constructive, depending on how it is handled. A person who can face conflict with others and reach mutual understanding evokes respect. The inability to cope with conflict constructively or the tendency to avoid or suppress it leads to disrespect and even increased hostility and antagonism.

**Initiative:** Initiative is exercised whenever effort is concentrated on a specific activity, to start something, to stop something, or to shift the direction and character of effort. A leader may take initiative or avoid taking initiative even when others expect action. Initiative, then, is the character and intensity of effort, or drive, supporting the actions taken.

**Inquiry:** Inquiry permits us to gain access to facts and data from those with whom we work as well as other information sources. The quality of inquiry often depends upon the individual's level of motivation to accomplish tasks and their desired outcomes. Inquiry is asking relevant questions rather than taking matters for granted.

**Advocacy:** To advocate is to take a position, to express one's opinions, attitudes, ideas, and convictions. A person may have strong convictions but think it risky to take a stand. Alternatively, an individual may not advocate his or her point of view and feel more comfortable supporting the views of others. Another person may embrace a point of view simply to oppose someone else or to win. Therefore, in terms of *advocacy*, an individual's leadership style is determined not only by the strength of the convictions a person holds, but how the individual advocates what he or she believes, and the way in which they express their opinions, attitudes, and ideas when dealing with others.

**Decision-Making:** It is through decision-making that resources are applied to performance. This may involve solo decision-making, in which the leader alone is the ultimate decision maker who then delegates responsibility to one or more individuals, or teamwork decision-making, in which all available resources are brought to bear on making and implementing decisions.

**Critique:** There are several methods to evaluate how team members solve operational problems as they seek to accomplish goals. Critique is a crucial part of this process and involves stepping away from or interrupting an activity long enough to study it, to see alternative possibilities for improving performance, and to anticipate and avoid any actions that may have adverse consequences. Without critique, individuals run the risk of maintaining traditional practices, regardless of whether the practice continues to be effective; with critique, they have insight into what they are doing and how they might be doing it more effectively.

How an individual operates within each of the six elements is dependent upon certain assumptions they hold regarding achieving results with and through others. In the next section, an explanation of the role of assumptions in guiding leadership behavior will be provided.

### *The Role of Assumptions*

When a person approaches a situation, they act on the basis of their subjective interpretation, which may or may not accurately reflect objective reality. The interpretation includes assumptions about what is true or reliable. In the context of a whole team, you may have a variety of subjective interpretations of the same situation. This will result in different assumptions derived from the situation, which may ultimately result in different approaches to working with and through other people. In summation, “assumptions guide behavior, and this behavior is clearly evidenced in the various approaches to leadership” (pg. 22).

Because assumptions play a part in organizing our relationships and our ways of conducting business, it is “important to understand them because usually they are silent. As a result, their central role in controlling behavior is likely to be unseen” (pg. 22). Blake and McCauley further explain, “when an assumption we make is embraced by those around us, it becomes an ‘absolute,’ not subject to question. Other possibilities are then ignored. The ‘absolute’ nature eliminates courses of action and blinds us to options that might produce sounder results” (pg. 22-23). Understanding our own assumptions about leadership can help us to see the impact of our behavior on the production efforts of those with whom we work and upon whose resources we depend.



## ***The Grid Framework***

The prior section explored leadership dynamics and how they impact the resources people use to solve problems. How leaders use these resources to manage the relationship arena (R2) significantly affects productivity. In this section, the Grid framework will be introduced, providing a common “language” for understanding different leadership styles individuals use to accomplish or enact organizational goals.

The Grid is built on three dimensions. The horizontal axis represents *Concern for Production*, or results. The vertical axis represents *Concern for People*, or how one feels about and treats those with whom they work to achieve results. Blake and McCauley stress that “Concern for” indicates “the character and intensity of the assumptions that lie beneath any leadership style. It is not a mechanical number that tells how much one produced or that depicts some quantifiable amount of concern expressed toward people” (pg. 26). The third dimension, *Motivational*, is formed when the first two axes intersect. The *Motivational* dimension answers the question, “Why do I do what I do?” Unlike the first two dimensions, this dimension’s function is similar to a battery. It has a plus (+) or positive end, represented by what we strive to achieve, and a minus (-) or negative end, representing those things we seek to avoid. This dimension will be discussed later in greater depth.

### ***Concern for Production***

Production represents any outcome or result. Because concern for production is not present in all people to the same degree, it is “necessary to have a systematic way of expressing the meaning of degree of concern” (pg. 26). The degree of concern can range from 1, a very low concern, to 9, a very high amount of concern.

Depending on the work setting, concern for production is expressed in different ways. In the nonprofit sector, for example, the terms *balanced budget*, *programmatic quality*, *diverse funding streams* or *accomplishment of mission* may be used. In terms of both quantity and quality, concern for production is also apparent in “the scope and soundness of decisions made, the number of creative ideas converted into policies or procedures, or quality and thoroughness of services provided to other organization members or to the customer” (pg. 27). Production reflects purpose and is seen in whatever an organization employs people to accomplish.

### *Concern for People*

The vertical axis, *Concern for People*, includes all the people in our lives – bosses, subordinates, colleagues, customers, lay people – with whom we interact on a day-to-day basis. Like the scale of degrees for the axis, *Concern for Production*, this axis also illustrates the level of concern, ranging from 1, a very low concern for people, to 9, a very high degree of concern.

Because leadership is exercised with and through others, our assumptions about people are important in determining effectiveness. Some of these assumptions may include reaching a conclusion that a person is selfish, altruistic, destructive, well intentioned, manipulative, honest, shy, or talkative. The main point is that people are human beings regardless of the context in which they work – industry, government, educational and medical institutions, or the home.

A boss whose ultimate goal is to accomplish the work may show concern for people in many different ways – by forced compliance, friendly gestures, “guilt tripping,” neutral message passing, accommodation and compromise, bargaining and trade-offs, or

gaining the commitment and understanding of others. However, once the concern is expressed, it is important to know that it elicits reactions. For example, "others may respond with enthusiasm or resentment, involvement or apathy, creativity or dull thinking, commitment or indifference, a willingness to take risks or a resistance to change" (pg. 28).

### *The Leadership Grid*

When both concern-for-production and concern-for-people are combined in various ways, a multitude of leadership styles emerge. For instance, "when a high production concern coexists with a low people concern, the leader is interested only in getting the job done" (pg. 28). On the other hand, "when a high concern for people is joined with a low concern for production, the individual seeks to promote harmonious relationships to make others happy" (pg. 29). Blake and McCauley have identified seven major theories for understanding individual differences in how people exercise leadership. Furthermore, each of these theories or orientations "defines a Grid style and represents a unique set of assumptions for using power and authority to link people to production" (pg. 29). It should be noted that these seven styles do not encompass the full spectrum of leadership style, but rather represent the "pure" combinations where the two axes intersect. Five of the seven Grid styles are illustrated in Figure 2.

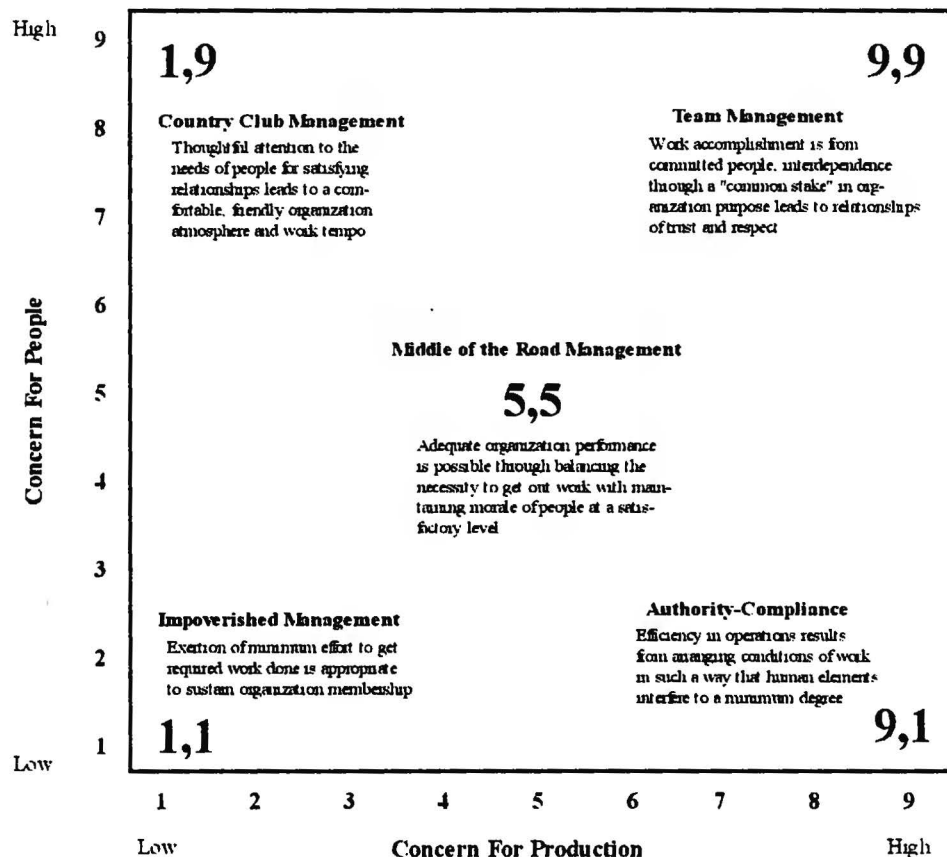
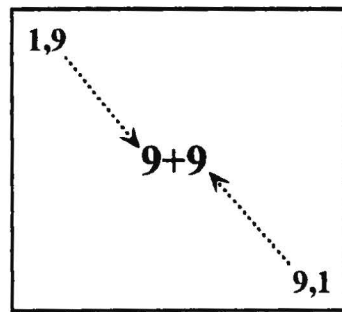


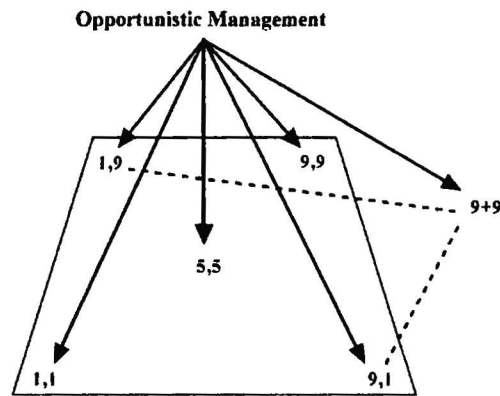
Figure 2. The Leadership Grid

The additional two leadership styles are combinations of the first five styles. *Paternalism* (See Figure 3) combines the production "9" of the 9,1 and the people "9" of the 1,9 Grid style. An alternative name for paternalism is "9+9" to denote that it is an addition of two different styles, rather than an integrated or fused style like the 9,9. With the 9+9 (Paternalism) management style, reward and approval are granted to people in return for loyalty and obedience; failure to comply leads to punishment. The other combination Grid style is *Opportunism* (See Figure 4), which incorporates "several or all of the other Grid styles, including *Paternalism*" (pg. 30). In Opportunistic management, organization performance occurs according to a system of exchanges, where effort is given only for an equivalent measure of the same. People adapt to the situation to gain

maximum advantage from it. These two additional leadership styles will be explained later in further detail.



**Figure 3.** 9+9: Paternalistic Management



**Figure 4.** Opportunistic Management

It is important to note that each Grid style is “a pattern of thinking about or analyzing a situation. Any Grid style is subject to change to another orientation as a result of increased understanding and practice. Thus, an orientation is not a personality characteristic or a fixed trait. The important point is in order to increase productivity a leader must be aware of alternative modes of operating, select the soundest approach, and apply the requisite skills to behave in more effective ways” when interacting with others (pp. 30-31).

### *The Motivational Dimension*

As mentioned above, the Grid is built on three dimensions – Concern for Production, Concern for People, and Motivations. Seven distinct leadership styles have been introduced based on the first two dimensions, and we now turn to address the question “What are the personal motivations of people who operate according to each of

the Grid styles?" Blake and McCauley stress that "only when we have a means for understanding what motivates people can we expect to appreciate how leaders, others, and ourselves included, work with one another to get results. By employing sound motivations to lead people we can expect to strengthen production, stimulate creativity, build morale, and make ourselves healthier in mental and physical terms" (pg. 32).

It was mentioned earlier that unlike the intensity or spectrum ranges for the first two dimensions of *Concern for Production* and *Concern for People*, the *Motivational* dimension is like a battery (See Figure 5) and identifies both the positive (+) and negative (-) motivations for each Grid style. It gives us insight as to why a person with a particular orientation behaves as he or she does: "what the person seeks as a desirable situation to promote (the positive motivation) and what he or she fears as threatening (the minus motivation)" (pg. 32). The midpoint of each axis is considered the "neutral or comfort zone where neither a positive or negative motivation is currently operative. This is where an individual may take his or her behavior for granted; it is almost second nature" (pg. 32). Figures 6 and 7 illustrate the motivations for the 9+9 (Paternalism) and Opportunism Grid styles.

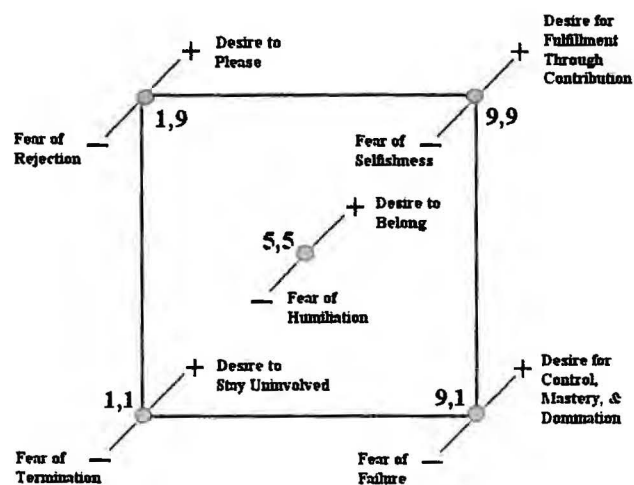


Figure 5. The Motivational Grid



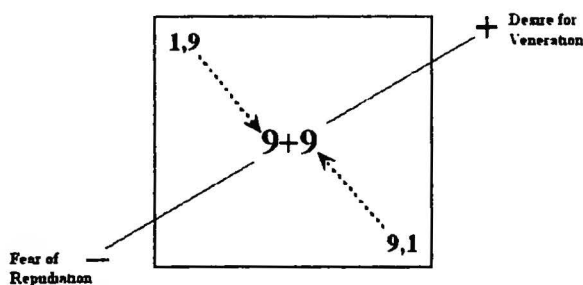


Figure 6. The motivations for paternalism.

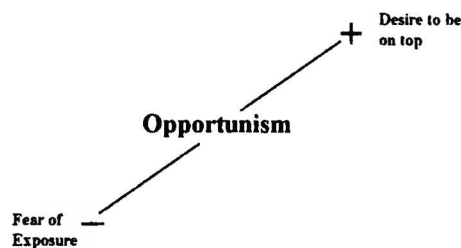


Figure 7. The motivations for opportunism.

Both ends of the motivational axis inform us as to what the individual may be feeling given any particular situation. The (+) end of the motivational axis tells us what an individual may be feeling when the situation is “smooth and favorable to realizing his or her objectives – the proactive, outgoing, forward-looking point of view. The (-) end tells us what the person is likely to feel when the going is rough, when he or she encounters obstacles that are experienced as threatening. They tend to be defensive behaviors, indicating action that is reactive” (pg. 32). Whatever the case may be, the situation determines the (+) or (-) motivational aspect of a Grid style that is prominent at any given time.

The dimensions of the Grid just explained relate to the three Rs (Resources, Relationships, and Results) in that they all describe dynamic aspects of behavior and lie in the realm of relationships. “Concern for production and concern for people, and the underlying positive and negative motivations describe how people operate with and through others in order to convert resources into results” (pg. 35). However, this has been primarily from the leader’s perspective. We now turn to The Subordinate Grid, a parallel grid that examines the effectiveness of different leadership styles from the subordinate’s perspective.

### *The Subordinate Grid*

Implicit within the Subordinate Grid is “the assumption of a power and authority relationship between interacting parties” (pg. 35). Blake and McCauley add “in the case where hierarchy does not rule, for instance between personnel in different departments or between colleagues grappling with a problem where neither is boss of the other, these reactions hold true in a relatively similar manner” (pg. 36). The horizontal axis is labeled *Concern for Accomplishing the Task*. The vertical is labeled *Concern for the Boss*. Like the Leadership Grid, the axis ranges are a spectrum of intensity from 1 to 9. Depending on how they come together, they also reveal seven major Subordinate Grid styles (See Figure 8), each with their own unique strategies and tactics for interacting with bosses. The Subordinate Grid completes the picture from both points of view, the leader and the subordinate, because no one in an organization operates in a vacuum. Together, the Leadership and Subordinate Grids provide a full spectrum of possible relationships.

The 9+9 (*Paternalistic*) subordinate is entitled “Know-It-All” and is characterized by the attitude that “I can command the boss’s favor by being a confidant and informal advisor. This is helpful because I ensure I know all there is to know about everything and everybody. I am the boss’s right hand and lieutenant” (pg. 37). The *Opportunist* Subordinate is entitled “Me-First” who’s attitude is “I sell myself up and down the line to gain support for getting to the top. I build credit by doing favors that I can call due at a later time. I tailor what I say depending on the person with whom I am dealing” (pg. 37).

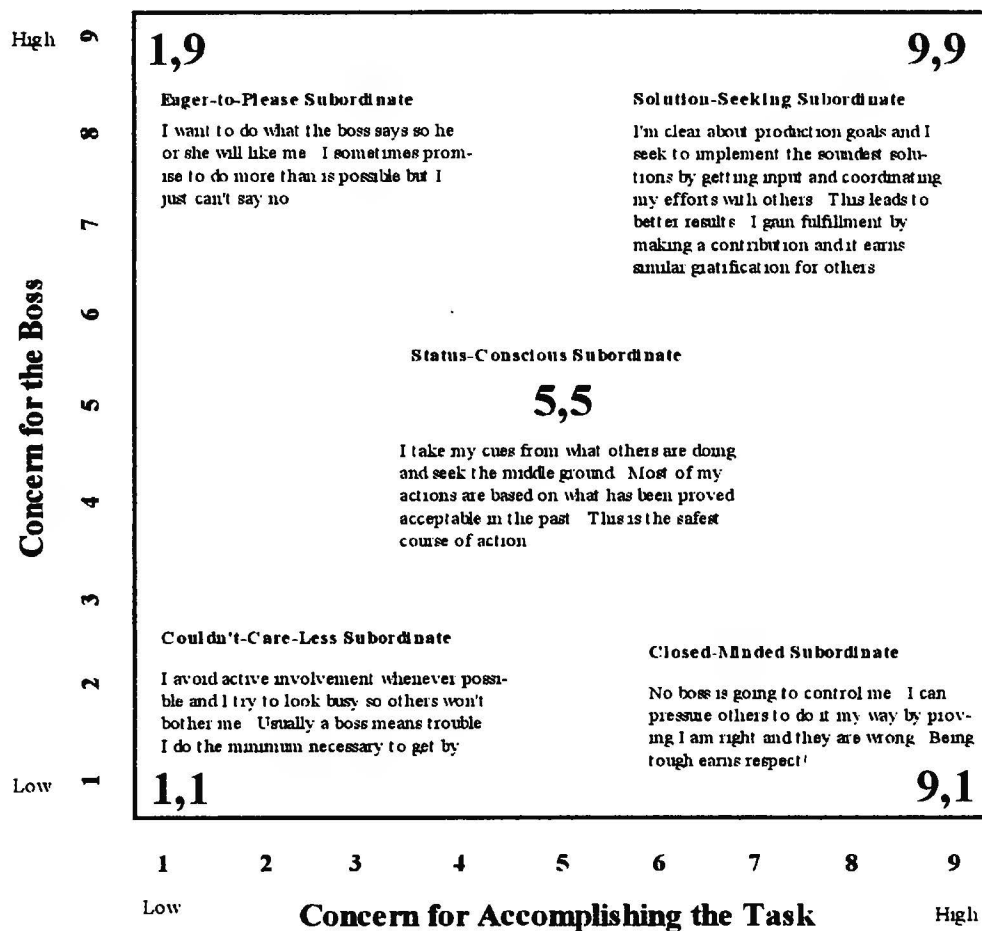


Figure 8. The Subordinate Grid.

### *Dominant & Backup Styles*

It is important to understand that a person does not have one definitive style at all times. In situations where an individual feels "uncertain about operating in the dominant mode," a backup style is revealed (pg. 43). Sometimes a person reverts to a backup style when "under pressure, tension, or in situations of conflict that cannot be readily resolved" (pg. 44). In addition, an individual's dominant style may be present when stakes are high, but it is when a person is under extreme fatigue, when stress is negligible, or when stress is extreme when backup styles are revealed.

Each person has a unique reason as to why they revert to a backup style. The distinction between dominant and backup is that dominant style “defines the underlying consistencies in a person’s behavior over time. Backup style characterizes the next most consistent behavior, and so on through whatever number of backup styles characterize any given individual” (pg. 44).

Some factors that may influence dominant grid style are organization culture, values, personal history, or no awareness of options. An *organization’s culture* is composed of many subcultures, making up all the relationships of its members. Culture impacts leadership behavior by cultivating or inhibiting the assumptions a person holds. A person’s assumptions are consistent with his or her *values* regarding the way to treat people or the way to achieve results. Furthermore, a person’s dominant style may result from deep-rooted *personal history*. For instance, an individual may be “predisposed to one approach over another as a result of early training. In other words, because of life experiences, a particular Grid style may be employed repeatedly until it becomes the dominant style” (pg. 45). Finally, sometimes an individual is *not aware of other options*. This may be due to the fact that our behavior is guided by assumptions that we adopted earlier in life without stopping to consider consequences that such behavior may bring. Until we “discover new sets of assumptions by which to act, our dominant behavior continues to be governed by antiquated rules” (pg. 46).

Blake and McCauley continue to emphasize the point that the Grid is “not a psychological assessment or evaluative mechanism; nor is it intended to categorize individuals or to place them in “slots” (pg. 46). It is a tool that allows us to describe attitudes and behavior. In addition, people adopt different approaches or display different

levels of concern at various times, and the dominant/backup formulation provides meaning to the range of assumptions a person may hold.

### ***Dimensions of Team Building***

Instead of focusing on the individual, the scope is now at the team level and the following question will be addressed: "How can team members implement needed changes for bringing about better action and increased productivity?" Blake and McCauley have identified six dimensions of team building that are subject to systematic study which team members can use to begin answering this question. Also, team members are "participants within the context of examining how each of these six dimensions is helping or hampering teamwork. If any one of these dimensions is less than sound, productivity of the team as a whole inevitably suffers. On the other hand, when action in all of these dimensions is sound, team members feel challenged to pursue and achieve high standards of excellence" (pg. 299). The six dimensions of team building viewed from the perspective of R2 (Relationships) include power/authority, norms/standards, morale/cohesion, goals/objectives, structure/differentiation, and critique/feedback. The following is a brief description of each.

**Power/Authority:** When a leader exercises too much power/authority, suppressing potential resources, it yields relationships that suffer and results are sacrificed. In turn, subordinates learn not to offer input. Furthermore, when a leader fails to exercise strong and directive leadership, resources are uncoordinated and people flounder and become frustrated. Ideally, power/authority should be used to channel the full resources that members have to offer. Figure 9 illustrates power/authority as exercised in two of the Grid styles.

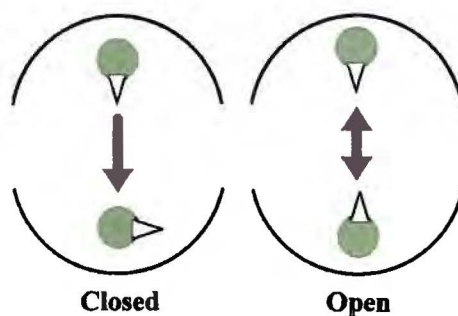


Figure 9. Power/Authority viewed from 9,1 "closed" and 9,9 "open" styles.

**Norms/Standards:** Norms/standards are traditions, precedents, and past practices of an organization or team that guide an individual's behavior. They define the boundaries in which individuals operate and also define what is considered "taboo." Often they are outmoded and antiquated, binding people to rigid forms of behavior that characterize an organization or team culture, resulting in the lack of flexibility, creativity, and innovation required for converting resources into results. Ideally, norms and standards should function in a way that provides direction, a sense of comfort, and a positive group identity. Figure 10 illustrates norms/standards as exercised in two of the Grid styles.

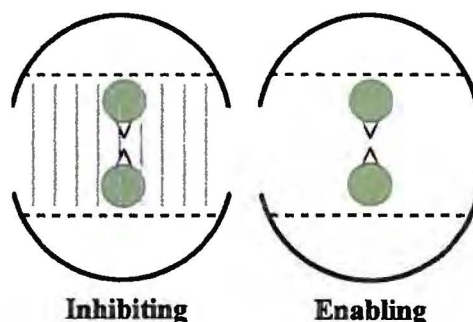
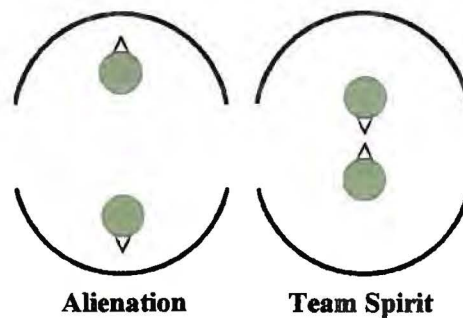


Figure 10. Norms/Standards viewed from 9,1 "inhibiting" and 9,9 "enabling" styles.

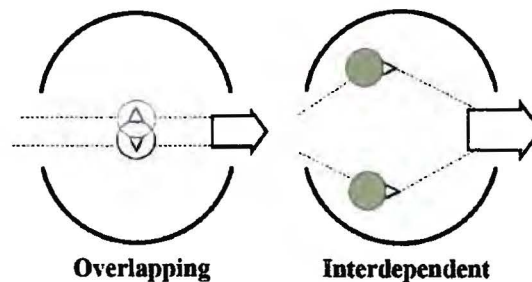
**Morale/Cohesion:** Whether or not individuals in a team feel a sense of membership with one another and identify with the organization as a whole can have a profound impact upon productivity. Significant resources may be sacrificed when people feel unmotivated to work with one another. Even in a team that appears to be functioning well, synergistic opportunities may be lost because each member is working independently, rather than working interdependently with others. Figure 11 illustrates the concept of morale/cohesion.





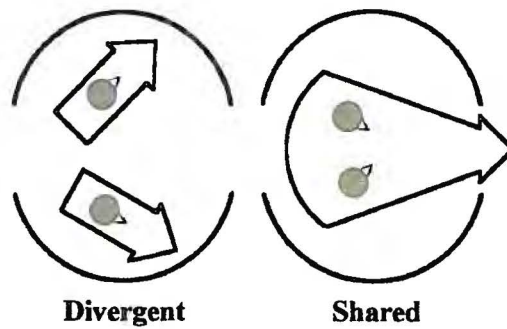
**Figure 11.** Two illustrative perspectives on the relationship dimension, morale/cohesion.

**Structure/Differentiation:** Many times work relationships are structured to avoid conflict, keeping people or departments separate. The underlying assumption is that lack of contact equals lack of conflict, but may also equal lack of cooperation and coordination. Another possibility is that efforts are redundant, and job responsibilities are unclear and/or overlapping. The hope is that someone takes the initiative to see that the important work gets done. If this doesn't happen, because responsibility lies with no one, no one is to blame. However, the team as a whole has failed. The nature of a sound structure is illustrated in Figure 12.



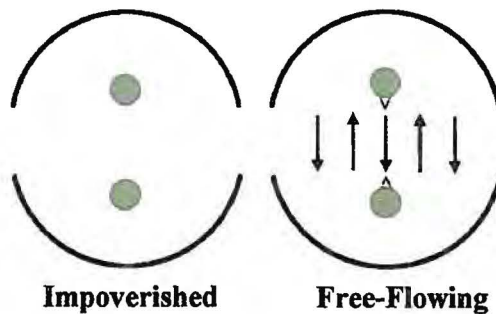
**Figure 12.** "Overlapping" and "interdependent" structural arrangements.

**Goals/Objectives:** If the goals and objectives that dictate how effort is to be channeled are unclear or unacceptable to those who are responsible for implementing them, the resources (R1) these individuals have to contribute will most likely be underutilized, which will prohibit the production of good results (R3). On the other hand, when individuals have a sense of ownership of organizational goals, it increases the likelihood that resources will be applied to the process of implementation. In addition, when personal goals and objectives are divergent from organizational goals, this creates tension and conflict that drains energy from what could be constructive effort. Sound versus unsound goals and objectives are shown in Figure 13.



**Figure 13.** Divergent vs. shared goals and objectives.

**Critique/Feedback:** Feedback and critique are the natural methods for an organization to constantly study itself and be in a position to induce changes as needed to rectify operational difficulties. Absence of this quality is seen in teams that operate in a reaction/response fashion, moving from one crisis to another, without every stopping to observe the process by which they are operating. Alternatively, critique may occur in the form of blame and criticism. Repeated mistakes can be avoided if a team stops to consider what they have done and how they might be able to improve similar tasks in the future. Two versions of critique, one unsound and the other sound, are illustrated in Figure 14.



**Figure 14.** Impoverished vs. free-flowing feedback/critique.

These dimensions constitute the six key aspects of teamwork that impact upon how effectively we use our resources and convert them into real results. When each of these dimensions is being approached in a sound manner, resources can be fully mobilized and converted into something greater than could be accomplished by each individual working on an individual basis. It is the job and responsibility of leadership to

successfully manage this process in a way that leads to the realization of organizational purpose.

## **Construction of The Questionnaire**

The purpose of the questionnaire was to assess the quality of leadership and management of The Jewish Federation Valley Alliance. Furthermore, this methodology was considered most logical given realistic time restraints. To help facilitate the development of the questionnaire, a set of goals was established and used to determine the nature and content of the questions. These goals will be discussed, followed by a discussion of the questions, the coding system used to ensure confidentiality, the cover letter accompanying the questionnaire, and the procedures regarding distribution and collection of the questionnaires.

### ***Goals of the Questionnaire***

Using Blake and McCanse's theoretical framework, six goals were established. The first goal was *the data must illustrate system barriers in the relationship arena*. As mentioned earlier, the theory stresses that effective leadership is determined by how well a leader is able to convert resources (R1) into results (R3) in working with and through others by establishing and maintaining sound relationships (R2). Therefore, the data needed to accurately identify system barriers in the relationship arena. The remaining five goals were more specific in scope and identify different aspects of the relationship arena. They were: 1) *The data must illustrate individual leadership styles by management level*. Blake and McCanse explain that raising the awareness of one's leadership style can uncover underlying self-assumptions and increase objective views of

ourselves and others, providing the opportunity to enhance styles of leadership. 2) *The data must illustrate dynamics between supervisors and subordinates.* Identifying which supervisor-subordinate dynamics are positive and negative will isolate specific areas needing attention. Blake and McCanses's Subordinate and Leadership Grids are useful and provide the full spectrum of possible working relationships. 3) *The data must illustrate personal views at the individual, staff, and organizational level,* and 4) *The data must illustrate individuals' underlying assumptions,* are related. Capturing individuals' underlying assumptions at the individual, staff, and organizational level, would highlight where individuals tend to focus their attention, and correlations between levels and negative and positive views. For instance, if an individual expressed that their supervisor takes their feedback seriously, while at the same time expressed that the organization does not have a systematic method of receiving feedback, it would show that the individual has a more positive view of their supervisor and less positive view of the organization. This will determine the level and nature of the intervention. 5) *The data must illustrate the level of quality of teamwork,* would provide greater insight into pinpointing system barriers at the team level. Furthermore, team building "offers a systematic approach" allowing a team to study "how it is operating relative to how it might be operating" (pg. 299).

### ***The Questions***

The establishment of the six goals added structure and focus to the process of determining the nature and content of the questions. The two existing "templates" outlined by Blake and McCanse were the *Elements of Leadership*, and *Six Dimensions of Team Building*, and were used as the framework for the questions.

## *Elements of Leadership*

According to Blake and McCanse, “leadership is a complex process” that can be “broken down into key elements” making it “easier to examine and understand” (pg. 16). Again, these elements are *conflict solving*, *initiative*, *inquiry*, *advocacy*, *decision making*, and *critique*. In addition, an individual’s leadership style determines how they deal with each of these six key elements. Questions 19-24 of the questionnaire (See Appendix A) addressed these six elements of leadership using a ranking format.

Each participant was asked to complete each sentence by ranking them 1 through 7; 7 representing the sentence that MOST typifies how they operate, 6 representing their next most typical approach, and so forth. The seven statements of each question correlate with Blake and McCanse’s seven major styles of leadership, and depict different leadership approaches relating to each element. The statements and exercise paralleled an exercise conducted by Blake and McCanse (pp. 17-22). The statements were also scrambled for each question (See Figure 15) to ensure that the participant remained unaware of patterns or the purpose of the exercise. The data resulting from questions 19-24 were used to track dominant and backup leadership styles, both individually and collectively the staff as a whole, and also to track trends at each staff level.

Elements of Leadership	Leadership Style						
	1.9	1.1	5.5	9.9	9.1	9+9	OPP.
Conflict Solving	A	B	C	D	E	F	G
Initiative	G	F	E	D	C	B	A
Inquiry	F	A	E	B	G	C	D
Advocacy	B	G	D	C	A	F	E
Decision Making	C	D	A	F	B	G	E
Critique & Feedback	E	C	B	A	D	F	G

**Figure 15.** Key for questions 19-24.



### *Dimensions of Team Building*

There are six dimensions of team building, which Blake and McCauley have identified: *Power/Authority*, *Norms/Standards*, *Morale/Cohesion*, *Structure/Differentiation*, *Goals/Objectives*, and *Feedback/Critique*. These dimensions “are subject to systematic study” and were used to determine the quality level of teamwork (pg. 299). Questions 1-18 of the questionnaire addressed these six dimensions of team building.

Three questions were constructed from each dimension of team building, either at the individual, staff or organizational level. A chart is provided (See Figure 16) to illustrate the dimension of team building, the corresponding questions, and the scope of the questions.

<b>Dimensions of Team Building</b>	<b>Scope of Question</b>		
	<b>Individual</b>	<b>Staff</b>	<b>Organization</b>
Power/Authority	13,17	6	
Norms/Standards	16,18		4
Morale/Cohesion	12,14	5	
Structure/Differentiation	10	7	3
Goals/Objectives	15		1,9
Critique/Feedback	11		2,8

**Figure 16.** Key for questions 1-18.

The scope of the corresponding questions was determined by the nature of each dimension of team building (See pages 13-14 for descriptions). For instance, the nature of *Power/Authority* is individual and staff oriented, more so than organization oriented.

For each question (with the exception of question 9), participants were asked to circle the response that most accurately reflects their reaction to each statement using *Strongly Agree*, *Agree*, *Unsure*, *Disagree*, and *Strongly Disagree*. For question 9,



participants were asked to select from a list of ten, the top three goals and objectives they feel should be The Valley Alliance's top priorities. The data resulting from questions 1-18 determines the quality level of teamwork, identifies dynamics between supervisors and subordinates, and highlights underlying assumptions at the individual, staff and organizational level.

Due to the nature of the questionnaire a coding system was used to ensure individual confidentiality. Using an internal master list, each staff member was randomly assigned a 3-digit number. The coding system was a critical component of the study and served as a mechanism to ensure open and honest responses from staff members.

A cover letter was written to accompany the questionnaire (See Appendix B). The purpose was four-fold: 1) to thank the staff for their willingness to participate in the research project, 2) to explain the purpose of the project and how the findings would be used, 3) to ensure that their responses will remain confidential, and 4) to provide instructions for filling out and returning the questionnaire. It served to answer any questions and address misconceptions individual staff members may have had.

#### *Distribution & Collection*

On Friday, March 15, 2002, the staff received an email informing them of the research project and that the questionnaires would be distributed the following Monday. Like the cover letter, the email served a similar purpose in terms of informing them about the nature of the project, its purpose, the confidentiality piece, and thanking them in advance for their participation. On the following Monday, the questionnaires were prepared, which included assigned code numbers, cover letters, and a blank envelope attached. Each questionnaire was hand delivered and respondents were verbally referred

to the cover letter. The instructions on the cover letter were to complete the questionnaire and return them no later than 3:00pm on Friday, March 22<sup>nd</sup>.

## **The Jewish Federation Valley Alliance**

As a satellite office of The Jewish Federation of Greater Los Angeles, The Valley Alliance serves the five-valley region, which includes the Conejo, Simi, San Fernando, Antelope and East valleys. The Jewish population is estimated at 250,000 and represents almost 50% of the citywide Jewish community. The Valley Alliance facilities are housed in the Bernard Milken Jewish Community Campus building in West Hills, and work alongside a multitude of Jewish agencies such as The Bureau of Jewish Education, Jewish Family Services, and the West Valley Jewish Community Center.

### *Staff Composition*

During the time of conducting the questionnaire, the Valley Alliance staff was composed of eighteen members, and was categorized as follows: an Executive Director, an Associate Executive Director, a Director of Planning & Allocations/Jewish Community Relations Committee, a Director of the Women's Department, a Major Gifts Director, a Director of Public Relations, a Facilities Director/ Office Manager, a Director of Arts Council, a Campaign Coordinator, two Campaign Associates, five administrative assistants, and two graduate interns.

For the purpose of the project, staff levels were divided into three categories: Upper/Middle Management, Line Staff, and Support Staff. *Upper/Middle Management* denotes professional staff that has supervisory responsibility. *Line Staff* denotes professional staff that does not have supervisory responsibility. *Support Staff* denotes

nonprofessional staff that assists professional staff in completing tasks and assignments. Furthermore, the graduate interns were considered line staff for this project.

### *Department and Committee Structures*

The Valley Alliance departmental structure includes the following: a Women's Department, Planning and Allocations, Community Relations Committee, Leadership Development Cabinet, United Jewish Fund, and Facilities. The Committee structures include a Valley Alliance Board of Directors, an Executive Board, and departmental committees that relate to each division.

### *Environmental Conditions*

It is important to take into consideration the current external environmental conditions that may have influenced the staff's questionnaire responses. A few months prior to conducting the questionnaire, The Jewish Federation of Greater Los Angeles had been impacted by a decline in the market, causing a decrease in net assets. As a result, a decision was made to downsize and layoff a portion of staff, and in turn, The Valley Alliance lost two professional staff members. Ultimately, this placed a significant amount of strain on the staff, causing them to shift priorities and agendas.

## **Findings of The Data**

The data was organized in graph form according to the two templates *Elements of Leadership* (Questions 19-24) and *Dimensions of Team Building* (Questions 1-18). Illustrated within the *Elements of Leadership* data set (See Appendix C) are the dominant and backup leadership styles under each element of leadership, and the collective

dominant and backup leadership styles, both by management levels. As mentioned earlier, each participant was asked to rank from 7 to 1 the statements that most typifies how they operate to the least typical approach. Responses of “7” represent the participants’ dominant style, and responses of “6” represent their backup style. A *Leadership Style Reference Guide* (See Appendix D) has been compiled to assist the reader. Contents include motivations, behavioral characteristics, and related traits under the six elements of leadership, all pertaining to each style of leadership. Illustrated within the *Dimensions of Team Building* data set (See Appendix C) are the responses to the questions related to the dimensions of team building. Again, the responses have been grouped by management levels. To ensure individual confidentiality, responses from upper and middle management positions have been combined into one category.

## ***Elements of Leadership***

### ***Conflict Solving***

Under the dominant styles of conflict solving, the staff majority was 5,5 (50%). The remaining 50% was highly fragmented and represents other styles. The most cohesive management level was among line staff, and a high level of fragmentation occurred among upper/middle management and support staff. Under the backup styles of conflict solving, the two major styles were 9,9 (44%) and 5,5 (39%). Overall, the level of staff cohesiveness was greater, including upper/middle management. There was less cohesiveness among line staff, however its core was 9,9.

### *Implications*

The dominant styles suggest a staff whose intentions reflect a low concern to resolve conflict. The 5,5 leader's approach to conflict solving emphasizes avoidance of disagreeable tension. Instead, all attention is focused on finding a compromise that everyone can agree with rather than focusing on the soundest solution to the conflict. Furthermore, action is based upon cues taken by others, and because the majority of this 5,5 group is comprised of line staff (subordinates), cues are most likely from upper/middle management. However, the fragmentation among upper/middle management implies diverse and opposing views on how to resolve conflict, resulting in a lack of consensus.

The backup styles suggest a staff whose ability to effectively resolve conflict occurs only in dire situations or circumstances when stress levels are high. The 9,9 leader views conflict as an opportunity to gain understanding of what is considered the most sound solution. They seek out reasons for the conflict in order to resolve underlying causes of tension. However, upper/middle management is still divided between 5,5 and 9,9, and the 9,9 group consists primarily of line staff. One possible explanation is that when the situation is calm and stress levels are low, the line staff may have the desire to engage in effective conflict solving, but is hesitant and waits for upper/middle management to act.

### *Initiative*

Under the dominant styles of initiative, no outright majority existed. The majority was 1,9 (28%), followed by 9,9 (22%) and 9,1 (22%). Every management level was fragmented, and the largest core consisted of upper/middle management under the 9,1

style. Under the backup styles, the staff majority was 1,9 (33%), followed by 5,5 (22%). A high level of fragmentation still existed, and no true core among management levels was apparent.

### *Implications*

According to both orientations of leadership, the staff's approach to initiative is very broad and diverse, and has the potential to cause opposition and a lack of consensus on how business should be conducted. Under both dominant and backup orientations, the majority of staff assume a 1,9 style, characterized by the eagerness to be helpful and supportive of others. Furthermore, the overall fragmentation of upper/middle management suggests inconsistent modeling for line and support staff in regards to initiative. It is possible that these mixed messages may be causing confusion for how line and support staff should react. The main thrust for 1,9 leadership combined with the diverse approach from upper/middle management seems to be creating an environment where the lines of authority are blurred, and assumptions regarding roles for initiating tasks, assignments, and projects are unclear.

### *Inquiry*

Under the dominant styles of inquiry, the staff majority was 9,9 (44%) followed by 9,1 (33%). The greatest level of cohesiveness existed among line staff (9,9). Slight fragmentation existed among upper/middle management, and greater fragmentation among support staff. Under the backup styles, the staff majority was 5,5 (33%) followed by a greater amount of fragmentation. The largest cores existed among upper/middle management and line staff (5,5).

## *Implications*

According to the dominant styles, the majority of staff, consisting primarily of line staff, understands the 9,9 approach to inquiry, but is countered by a large portion that sees inquiry from a 9,1 perspective. The 9,9 leader's approach to inquiry is comprehensive, ensuring that all sides of a question or issue are evaluated in a thorough and analytical manner. Alternatively, the 9,1 leader views knowledge as power and a tool for exercising domination, mastery, and control. Furthermore, a small portion of upper/middle management operates under the Opportunistic style, which is characterized as having a strong desire to know everything that is going on in order to use the knowledge as "leverage" with others. These diverse styles of inquiry among upper/middle management could cause potential harm in terms of role modeling and reinforcing a consistent approach. However, it seems that the core leadership is among the line staff.

When staff shifts to backup styles, the majority becomes 5,5. The 5,5 leader's approach to inquiry is cautious and shallow to avoid confrontation or to being challenged. Questions are framed in a vague and indirect fashion in order to gauge responses and reframe questions that are challenged. In other words, there is a greater concern for protecting the self, rather than focusing on the issue at hand. Furthermore, the fragmentation among upper/middle management further supports the concern expressed above regarding the lack of role modeling. It is possible that the high level of diversity among support staff is a manifestation of this point. In light of this fragmentation, the line staff seems to be maintaining a fair amount of cohesiveness.



## *Advocacy*

Under the dominant style regarding advocacy, the staff majority is 9,9 (67%). The most cohesive group is among upper/middle management (9,9). The line staff is less cohesive, and the support staff is very fragmented. Under the backup styles, the majority is 5,5 (39%), followed by 9+9 (28%) and 1,9 (22%). These three styles include a portion of every staff level. The largest core of upper/middle management is 9+9.

## *Implications*

The dominant styles suggest that a large majority of staff understands 9,9 advocacy. The 9,9 leader approaches advocacy by openly expressing concerns and convictions, while also shifting to positions that offer sounder solutions. It is apparent that all of upper/middle management, and most of the line staff believe in this principle. However, the support staff operates using very different styles of advocacy, and serves as a potential source of tension.

When staff operates using backup styles, three main styles occur, potentially serving as a main source of tension. The major style is 5,5 consisting primarily of line staff. The 5,5 leader expresses convictions in a cautious fashion in order to avoid confrontation that could risk their social status. The second major style is 9+9 consisting primarily of upper/middle management. The 9+9 leader expresses strong convictions intensely, often with an overtone of moralism as in *shoulds* and *should nots*, or *oughts* and *must nots*. They are also very protective of their convictions. The third main style is 1,9. The 1,9 leader embraces the ideas of others, even if personal convictions exist. They feel it is better to be supportive than right. While the majority is 5,5, final decisions

are most likely based on 9+9 leadership. These divisions could possibly generate anger and resentment when high stress situations arise.

### *Decision Making*

Under the dominant styles regarding decision making, the staff majority is 9,9 (72%). The majority of all staff levels fall under this style with minimal fragmentation. Under the backup styles, the staff majority is 5,5 (67%). Again, the majority of all staff levels fall under this style with minimal fragmentation.

### *Implications*

The dominant styles suggest a high level of staff cohesiveness and understanding of 9,9 decision making. The 9,9 leader focuses on achieving understanding and agreement among those impacted by the decision, and decisions made reflect the best available thinking. It should be noted that a small fraction of upper/middle management operates using 9+9 principles. The 9+9 leader sees himself or herself as the sole decision maker, and provides convincing arguments that demonstrate how these decisions are for everyone's own good and that reflect favorably on his or her wisdom and judgment. This may be a potential source of tension and resistance among upper/middle management.

When staff operates using backup styles, the majority shifts to a 5,5 style. The 5,5 leader can be described as someone who searches for workable decisions that others find acceptable. Popularity is considered the key determinant of decision making rather than objective evidence. This suggests that when under significant stress, critical thinking decreases and criteria for decisions shift from the issue at hand to what is best for the staff. Furthermore, a small fraction of upper/middle management shift to the

Opportunistic style, which is described solely as self-interest; decisions are made that are likely to get what he or she wants. Upper/middle management is slightly fragmented, but could potentially be unproductive toward creating consistent decision making.

### *Critique*

Under the dominant styles regarding critique, the staff majority is 9,9 (61%), followed by 5,5 (28%). Division exists among all staff levels, but the core of upper/middle management and line staff is 9,9. Under the backup styles, the staff majority is 5,5 (44%), followed by 9,9 (22%) and 1,9 (17%). Division exists among all staff levels. The bulk of upper/middle management and line staff falls under these three main styles, but support staff is spread more widely among diverse styles.

### *Implications*

According to the dominant styles, a high level of staff cohesiveness exists, and over half of the staff understands the notion of 9,9 critique. The 9,9 leader places a high value on critique and encourages two-way feedback to strengthen operations. Focus is not only place on the “what” and the “who,” but also on the “how” and the “why.” However, division among staff levels does exist. A remaining portion of upper/middle management and line staff operate using the 5,5 style. The 5,5 leader is known to give feedback that is superficial and shallow, rather than feedback that is candid, open, or straightforward. Negative feedback is avoided in order to prevent “backfire.” This small group of 5,5 could possibly cause harm in terms of modeling sound critique. Subordinates could learn by watching actions of their superiors that negative feedback is neither acceptable nor productive.

When staff shifts to backup styles, the majority becomes 5,5, and the concern expressed above is more evident. This is supportive by the fact that a large portion of upper/middle management shift to a 1,9 style. The 1,9 leader only provides feedback that stresses the positive qualities of subordinates. Negative feedback is avoided altogether. Furthermore, the majority of staff offering sound critique (9,9) comes from line staff, and suggests stronger leadership among line staff. The high level of fragmentation among support staff reflects very opposing views and approaches to critique. This could serve as a potential source of breakdown regarding internal operations. Because support staff handles the majority of the technical legwork, it is vital that they critique their work in an effective manner. If work is not well critiqued, the quality and quantity of production could be greatly reduced.

### *Collective Leadership Styles*

The culmination of all six elements of leadership equates to a collective leadership style. Under the dominant leadership styles, the staff majority is 9,9 (67%), followed by 5,5 (28%). The majority of upper/middle management and line staff is 9,9, and the support staff is less cohesive. Under the backup styles, the staff majority is 5,5 (61%), followed by a small group of 9,9 (22%). The majority of upper/middle management and line staff is 5,5. Slight fragmentation exists among upper/middle management, and greater fragmentation among support staff.

### *Implications*

The dominant styles suggest that the majority of staff understand 9,9 leadership principles. The 9,9 leader is motivated by the desire for fulfillment through contribution,

and fears being seen or depicted as selfish. This leader manages by principle, inspires creativity, has clear expectations, and avoids self-interest. However, a small portion of staff operate using 5,5 leadership. The 5,5 leader is motivated by the desire to belong, and fears humiliation. This leader is status conscious, supports the majority viewpoint, avoids risks, and doesn't rock the boat. The support staff is almost evenly divided between the two types of leadership.

When operating using backup styles, the staff majority becomes 5,5, and only a minimal percentage of 9,9 leadership is maintained. Furthermore, the support staff assumes more diverse styles of leadership. The major shift to 5,5 suggests that when under great pressure and tension, the staff becomes more conservative in nature. The status quo becomes the precedent, and greater focus is turned inward toward the self, rather than toward the issue at hand. The diversity among support staff suggests that production decreases due to the lack of synergy and consensus.

## ***Dimensions of Team Building***

### ***Power and Authority***

*"Most of the time when I am given an assignment, my supervisor(s) gives me clear and precise instructions."*

The majority of staff (39%) was *unsure* with the statement, 39% *agreed/strongly agreed*, and 22% *disagreed*. The majority of *agrees* consisted of upper/middle management, and the majority of *disagrees* consisted of line staff. Furthermore, a little more than half of line staff, and about a third of upper/middle management were *unsure*. Most support staff either *strongly agreed* or *agreed*.

*"Often times, I have the urge to express my ideas and opinions to my supervisor(s), but end up holding it inside."*

The majority of staff (56%) *disagreed* with the statement, 22% *strongly agreed*, and 11% were either *unsure* or *agreed*. The majority of all staff levels either *disagreed* or *strongly disagreed*. A small portion of upper/middle and line staff was *unsure*. Furthermore, close to half of support staff *agreed*.

*"The Valley Alliance staff is often frustrated with the lack of coordination when it comes to being productive."*

The majority of staff (50%) *agreed* with the statement, 33% were *unsure*, and 11% *disagreed*. The majority of line staff *agreed* with the statement. The majority of upper/middle management was *unsure* with the statement, and no upper/middle management *disagreed*. It should be noted that one staff person from upper/middle management abstained from answering the question.

### *Implications*

Given the staff's responses from these three statements, many implications can be understood regarding the use of power and authority. The responses from the first statement suggest that assumptions regarding the quality of supervisors' instructions differ among staff levels. The majority of upper/middle management feels satisfied with given instructions, where almost half the line staff seem dissatisfied. Furthermore, the majority of "uncertainty" suggests that a substantial level of doubt exists, indicating that clear and precise instructions are most likely not given, heard, or accepted.



The responses from the second statement suggest that the majority of staff is not hesitant to express their ideas and opinions to their supervisors. However, it raises the question as to whether or not supervisors are aware of, concerned with, or responsive to feedback from subordinates. In addition, it is clear from the third statement responses that the majority of staff, including representation from all levels, are unsatisfied with the lack of coordination. This information raises questions around responsibility, the quality of feedback, and whether or not the staff as a whole is addressing the coordination issue.

### *Norms and Standards*

*"I sometimes feel the desire to change the way something is done, but end up not doing so because it has been done the same way for such a long time and would take a lot of time and energy anyway."*

The majority of staff (56%) *disagreed* with the statement, 39% *agreed*, and 6% were *unsure*. The majority of upper/middle management *disagreed*, and the majority of line staff *agreed*. The support staff is split between *agree* and *disagree*.

*"Sometimes I want to say something, but choose not to because it is considered 'taboo'."*

The majority of staff (73%) *disagreed/strongly disagreed* with the statement, 22% *agreed*, and 6% were *unsure*. The majority of upper/middle management *disagreed*, and the majority of line and support staff *disagreed/strongly disagreed*. Almost a quarter of staff representing all levels *agreed* with the statement.

*"The Valley Alliance's working environment promotes flexibility, creativity, and innovation for staff to constantly discover new methods for increasing productivity."*

The majority of staff (89%) *agreed/strongly agreed* with the statement, and 6% were either *unsure* or *disagreed*. The majority of all staff levels *agreed* with the statement. The only *disagreement* came from support staff (6%).

### *Implications*

The staff responses from these three statements suggest that a culture of self-deception and denial exists regarding the effectiveness of norms and standards. This is illustrated by the diverse views from the individual perspective verses the organizational perspective. Responses from the third statement clearly indicate that almost 90% of the staff is satisfied with the Valley Alliance's work environment, allowing for constant discovery of increasing productivity. However, this is contradictory with responses from the first and second statements that emphasize the individual perspective.

Responses from the first statement indicate that most line staff sometimes feel the desire to change the way things are done, but choose not to because it would take a lot of time and energy. If the same majority of line staff approve of the working environment's flexibility and promotion of increased productivity, while at the same time having the desire to change the way things are done, this questions the accuracy of responses from the third statement. This point is further emphasized by the apparent split of opinions between line staff and upper/middle management, and raises another question about the relationship between the two staff levels, suggesting an "us versus them" mentality.

The contradiction between responses continues with the responses from the second statement. It was mentioned above that close to a quarter of staff representing all levels sometimes feel hesitant about saying something because it is considered taboo. This suggests a work environment that avoids discussions around controversial topics. At the same time, one would consider a working environment that allows staff to constantly discover new methods for increasing productivity to also promote the ongoing discussion of controversial topics. This contradiction seems to suggest that the staff is very protective of Valley Alliance's image, but the ability for staff to critique at the individual level is greater.

### *Morale and Cohesion*

*"I feel my supervisor(s) adequately recognizes and praises me for my efforts and hard work."*

The majority of staff (78%) *agreed/strongly agreed* with the statement, 17% *disagreed*, and 6% were *unsure*. The majority of upper/middle management and line staff *agreed/strongly agreed* with the statement. A small percentage of upper/management were *unsure*, and 40% of support staff *disagreed*.

*"I sometimes find myself unmotivated to work with other staff members on a project."*

The majority of staff (72%) *disagreed/strongly disagreed* with the statement, 22% *agreed*, and 6% were *unsure*. The majority of all staff levels either *disagreed* or *strongly disagreed* with the statement. Furthermore, almost a quarter of staff representing all levels *agreed* with the statement.

*"The Valley Alliance staff is a cohesive group that truly understands and values the concept of teamwork and interdependence."*

The majority of staff (67%) *agreed/strongly agreed* with the statement, 22% were *unsure*, and 6% *disagreed*. The majority of upper/middle management and line staff either *agreed* or *strongly agreed* with the statement. Almost a quarter of the staff representing all levels was *unsure*, and 20% of support staff *disagreed*. It should be noted that one staff person from upper/middle management abstained from answering the question.

### *Implications*

The responses from these three statements indicate that the majority of staff is satisfied with the level of morale and cohesion. However, a small portion of staff representing all levels is unsure or dissatisfied, which raises questions of doubt regarding the validity of the major consensus. This is illustrated in the responses from all three statements.

The first statement is regarding recognition and praise from supervisors, and responses show *disagreement* among line and support staff, and *uncertainty* among upper/middle management. This opposition to the major consensus suggests that supervisors of those who disagreed are either unaware of this viewpoint or are aware of it and have not addressed it. It also suggests the existence of a work environment that discourages negative feedback regarding the need for adequate recognition and praise. Furthermore, the majority of those who disagreed consist of support staff, which suggests greater staff cohesiveness between upper/middle management and line staff in terms of recognition and praise.

Responses from the second statement continue to invalidate the perceived level of staff morale and cohesion. This statement specifically refers to the working relationships between staff members, and responses suggest that close to a quarter of staff representing all levels are unmotivated to work with other staff members. This figure reinforces the suggestion that negative feedback is discouraged and ignored, and particularly suggests that discourse regarding staff morale and cohesion is nonexistent.

As opposed to the scope of the first two statements, the scope of the third statement is at the staff level. These responses suggest a major assumption that the staff is a cohesive group that understands and values the concept of teamwork and interdependence, but the existence of *uncertainty* and *disagreement* suggests otherwise. One suggestion regarding the uncertainty is that ambivalence between protecting the staff image versus being honest exists. It could also suggest that honesty was expressed and true uncertainty does exist. However, the fraction of *disagreement* among support staff insinuates the former suggestion.

### *Structure and Differentiation*

*"My supervisor(s) has provided me with a job description that clearly explains my areas of responsibility."*

The majority of staff (67%) *agreed/strongly agreed* with the statement, 22% were *unsure*, and 12% *disagreed/strongly disagreed*. The majority of upper/middle management *agreed/strongly agreed* with the statement. The majority of line staff was *unsure*, and the majority of support staff *agreed*.

*"When assigning staff to particular projects, the leadership puts forth a conscious effort to make sure individual areas of responsibility are not overlapping and duplicative in nature."*

The majority of staff (44%) *agreed* with the statement, 33% were *unsure*, and 22% *disagreed*. The majority of upper/middle management *agreed* with the statement, and a fraction *disagreed* or was *unsure*. Line and support staff was almost split evenly between the three responses.

*"The Valley Alliance has a strong, positive relationship with the Federation (central) that promotes cooperation and coordination."*

The majority of staff (61%) *disagreed/strongly disagreed* with the statement, 22% *agreed*, and 11% were *unsure*. The majority of upper/middle management and line staff *disagreed/strongly disagreed* with the statement. The support staff was almost divided between *agree* and *disagree*, with the majority tilted toward *agree*. It should be noted that one staff person from upper/middle management abstained from answering the question.

### *Implications*

Responses from the first two statements indicate diverse opinions regarding the structure and differentiation of job responsibilities at the staff level. Responses from the first statement suggest a division between upper/middle management and line staff. All of upper/middle management *agreed/strongly agreed*, where the majority of line staff was *unsure* and a fraction *strongly disagreed*. Due to the existence of *strong disagreement*, it is safe to suggest that the *uncertainty* could possibly indicate fear of challenging authority. The *strong disagreement* may serve as the true "voice" of line



staff. Regardless, the *uncertainty* indicates doubt and skepticism that provided job descriptions with clear explanations exist.

Responses from the second statement clearly reflect a division of staff views regarding duplication of job responsibilities, and imply possible explanations. First, the majority of upper/middle management suggests an effort to protect the leadership. Second, the opposition of *disagreement* and *uncertainty* among upper/middle management may have caused the formation of multiple “camps,” with line and support staff following suit. Furthermore, the *uncertainty* may indicate ambivalence regarding expression of honest opinions. It should be noted that a written comment was provided questioning whether “leadership” implied lay or staff and could also be the cause of *uncertainty*. Overall, questions about the validity of the statement exist among the staff.

The third statement was organizational in scope, and staff responses indicate the existence of an “us verses them” mentality between the Valley Alliance and Federation (central). This dynamic suggests that unity among the staff is greater when discussing their relationship with central. However, a small opposition does exist. The *uncertainty* consisting of upper/middle management is a sign of ambivalence, possibly due to selective perception regarding personal hopes and reality. Those that *agreed* consist primarily of support staff and may represent a sense of denial and the desire for the statement to be true. Regardless of the truth, this dynamic has strong implications regarding the Alliance’s working relationship with central and could serve as an obstacle toward the utilization of resources needed to adequately serve the community.

## *Goals and Objectives*

*"I am fully aware of what Valley Alliance's current goals and objectives are, and why they have been chosen."*

The majority of staff (50%) *agreed/strongly agreed* with the statement, 33% were *unsure*, and 17% *disagreed*. The majority of upper/middle management *agreed/strongly agreed*, and a fraction *disagreed*. The majority of line staff was *unsure*, with a fraction of *agreement* and *disagreement*. Support staff were almost evenly divided between *agree*, *disagree*, and *unsure*.

*"I feel like an active participant in the process of goal setting for the Valley Alliance."*

The majority of staff (50%) *agreed/strongly agreed* with the statement, 28% *disagreed*, and 22% were *unsure*. The majority of upper/middle management *agreed/strongly agreed*, and a fraction was *unsure*. Line and support staff were almost evenly divided between *agree/strongly agree*, *disagree*, and *unsure*.

*"The following are the three goals and objectives that I feel should be Valley Alliance's top priority."*

The majority of staff (72%) chose *Campaign Development and Staff Development*, 61% chose *Leadership Development*, 44% chose *Community Development*, 22% chose *Strategic Planning*, 17% chose *Program Development*, and 6% chose *Board Development and Overseas Community Development*. The top three priorities for upper/middle management and line staff were *Campaign Development*, *Leadership Development*, and *Staff Development*. The top three for support staff were *Staff Development*, *Community Development*, and a three-way tie between *Campaign Development*, *Program Development*, and *Strategic Planning*.

### *Implications*

The responses from the first two statements indicate a division in opinions, primarily between upper/middle management and line/support staff. The *disagreement* and *uncertainty* under the first statement suggest that current goals and objectives, including explanations for their existence, are not being communicated properly to all staff. The responses also suggest that only a select group of staff, consisting primarily of upper/middle management, is involved in the goal setting process. This point is reinforced by the responses from statement two, in which the majority of line staff *disagreed* with feeling like an active participant. Furthermore, both the high level of *uncertainty* and the division between line/support staff who *agreed/strongly agreed* and *disagreed* raise questions regarding the definition of "active participant." Why did some answer *agree/strongly agree* and others *disagree* or *unsure*? This does however suggest that no formal process exists in terms of establishing goals and objectives, and that current goals and objectives are the result of informal discussions.

In spite of the aforementioned divisions, the majority of staff is in agreement with desired goals and objectives. The three outright majorities were *Campaign Development*, *Staff Development*, and *Leadership Development*. Furthermore, significant alignment between upper/middle management and line staff exists, and major consensus among the staff as a whole exists regarding *Staff Development*. The only significant opposition exists regarding *Community Development* and *Strategic Planning*, with representation from all staff levels. Overall, the responses from the third statement seem to isolate the issue of goals and objectives as a gap in explicit, formal, and public communication. In other words, no "stamp of approval" by the staff as a whole seems to occur when

finalizing what goals and objectives will be set. In turn, it leaves questions among staff unanswered as reflected in the responses from the first two statements.

### *Critique and Feedback*

*"I often feel as though any feedback that I give my supervisor(s) is not taken seriously."*

The majority of staff (72%) *disagreed/strongly disagreed* with the statement, 17% were *unsure*, and 11% *agreed*. All of upper/middle management *disagreed/strongly disagreed*. The majority of line staff *disagreed/strongly disagreed*. Support staff was divided between *agrees* and *disagrees*.

*"The Valley Alliance has a systematic method of receiving critique and feedback from staff and constantly uses it to evaluate the effectiveness of internal operations."*

The majority of staff (39%) either *agreed* or *disagreed/strongly disagreed* with the statement, and 22% were *unsure*. The majority of upper/middle management *agreed*, and a fraction *disagreed* and was *unsure*. Line staff was almost evenly split between *unsure* and *disagree/strongly disagree*. Support staff was almost split evenly between *agrees* and *disagrees*.

*"I feel the Valley Alliance is constantly moving from one crisis to another, without ever stopping to reflect and discuss why."*

The majority of staff (50%) *disagreed* with the statement, 33% *agreed/strongly agreed*, and 11% were *unsure*. Upper/middle management and support staff were almost split evenly between *agree* and *disagree*. Line staff was divided into thirds between *strongly agree*, *unsure*, and *disagree*. It should be noted that one staff person from upper/middle management abstained from answering the question.

## *Implications*

Responses from all three statements raise questions about the existence, quality, and use of critique and feedback. The large majority of responses from the first statement suggest a work environment that promotes feedback. However, the small opposition amongst support staff (*agree*) and line staff (*unsure*) suggests otherwise. It is possible that the *uncertainty* indicates and supports an earlier suggestion that there exists a certain level of hesitancy for line staff to challenge authority. It could also reflect honest responses from a group of line staff that has not yet contemplated the topic.

Responses from the second statement suggest a staff that is more likely to criticize the organization than their supervisors, and raise the question as to whom the staff feels should be responsible for creating such a system of critique and feedback. As reflected in responses from the first statement, the majority of staff feels feedback given to their supervisors is taken seriously. A large portion of staff, consisting primarily of line staff, feels critique and feedback are not being used effectively. These two points are contradictory to one another and question the quality of the critique and feedback. It is possible that upper/middle management relies on line/support staff to provide feedback, and line/support staff relies on upper/middle management to establish a system. This creates a dynamic where each feels the responsibility is in the hands of the “other.”

Responses from the third statement further support the suggested absence of an effective system of critique and feedback. Nearly one third of staff representing all staff levels *agreed/strongly agreed* that the Valley Alliance constantly moves from one crisis to another, without ever stopping to reflect and discuss the causes of this behavior.

Regardless of the fact that half of the staff *disagree*, this response is a clear indicator that the quality of critique and feedback is minimal.

## **The Proposal**

The Valley Alliance Staff Development Proposal consists of three documents: a *Template For Action* (See Appendix E), *Specific Areas of Focus* (See Appendix F), and an *Implementation Timeframe* (See Appendix G). These documents were designed based upon the analysis of the questionnaire data. The *Template For Action* highlights the overarching goal, core objectives, and related process objectives that will assist the Valley Alliance staff in the process of improving the quality of leadership and management. It is a skeletal framework for the purpose of facilitating the process, and should be treated as a document that is flexible. The *Specific Areas of Focus* is an extension of the *Template For Action*, and highlights six identified system barriers from the data analysis, and suggested strategies for addressing the barriers. The *Implementation Timeframe* is a projection of estimated time periods for each process objective and their relation to one another. It is suggested that this document be used to help facilitate Process Objective C under Core Objective 2. An additional suggestion is to integrate the Staff Development Proposal with the established Strategic Planning Process.



## APPENDIX A

### HUC-JIR Graduate Research Project (2001-02) Jewish Federation Valley Alliance Staff Development Proposal Questionnaire

CODE #: \_\_\_\_\_

**For questions 1-18, please circle the response that most accurately reflects your reaction to each statement. (PLEASE USE AN INK PEN)**

1. I feel like an active participant in the process of goal setting for the Valley Alliance.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

2. The Valley Alliance has a systematic method of receiving critique and feedback from staff and constantly uses it to evaluate the effectiveness of internal operations.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

3. The Valley Alliance has a strong, positive relationship with the Federation (central) that promotes cooperation and coordination of necessary resources.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

4. The Valley Alliance's working environment promotes flexibility, creativity, and innovation for staff to constantly discover new methods for increasing productivity.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

5. The Valley Alliance staff is a cohesive group that truly understands and values the concept of teamwork and interdependence.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

6. The Valley Alliance staff is often frustrated with the lack of coordination when it comes to being productive.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

7. When assigning staff to particular projects, the leadership puts forth a conscious effort to make sure individual areas of responsibility are not overlapping and duplicative in nature.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

8. I feel that the Valley Alliance is constantly moving from one crisis to another, without ever stopping to reflect and discuss why.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

9. The following are the three goals and objectives that I feel should be Valley Alliance's top priority. (Select only three).

- ☐ Board Development
- ☐ Campaign Development
- ☐ Community Development
- ☐ Lay/Staff Relations
- ☐ Leadership Development
- ☐ Overseas Community Development
- ☐ Program Development
- ☐ Staff Development
- ☐ Strategic Planning
- ☐ Other: \_\_\_\_\_

10. My supervisor(s) has provided me with a job description that clearly explains my areas of responsibility.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

11. I often feel as though any feedback that I give my supervisor(s) is not taken seriously.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

12. I feel my supervisor(s) adequately recognizes and praises me for my efforts and hard work.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

13. Most of the time when I am given an assignment, my supervisor(s) gives me clear and precise instructions.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

14. I sometimes find myself unmotivated to work with other staff members on a project.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

15. I am fully aware of what Valley Alliance's current goals and objectives are, and why they have been chosen.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

16. I sometimes feel the desire to change the way something is done, but end up not because it has been done the same way for such a long time and would take a lot of time and energy anyway.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

17. Often times, I have the urge to express my ideas and opinions to my supervisor(s), but end up holding it inside.

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

18. Sometimes I want to say something, but choose not to because it is considered "taboo".

Strongly Agree      Agree      Unsure      Disagree      Strongly Disagree

**For questions 19-24, again with an ink pen, please complete each sentence by ranking them 1 through 7. (7 represents the sentence that MOST typifies how you operate; 6 represents your next most typical approach; and so forth down to 1). RELAX...TAKE YOUR TIME...AND REMEMBER...THERE ARE NO RIGHT OR WRONG ANSWERS.**

19. When faced with a *conflict*, I \_\_\_\_\_.

- A. \_\_\_ try to soothe feelings to keep people together.
- B. \_\_\_ maintain a neutral stance or try to stay out of the conflict altogether.
- C. \_\_\_ try to find a reasonable position that everyone can live with.
- D. \_\_\_ seek out reasons for it in order to resolve underlying causes of tensions.
- E. \_\_\_ try to cut it off or win my position.
- F. \_\_\_ acknowledge it but continue to focus on the importance of expressing my point of view.
- G. \_\_\_ put forth effort to avoid it, and also prevent getting caught head on.

20. When it comes to taking *initiative*, I \_\_\_\_\_.

- A. \_\_\_ initiate actions that are in my own best interest by seeking a trade-off with others.
- B. \_\_\_ expect others to follow my lead and extend praise to those who support my effort.
- C. \_\_\_ drive myself and others.
- D. \_\_\_ exert vigorous effort and others enthusiastically join in.
- E. \_\_\_ try to maintain a steady pace and focus my attention on accomplishing tasks I have been assigned.
- F. \_\_\_ apply just enough energy to get by, generally in response to requests from others.
- G. \_\_\_ initiate whatever actions might help and support the efforts of others.

21. When it comes to *inquiry*, I \_\_\_\_\_.

- A. \_\_\_\_\_ rarely ask questions, and usually go along with what others tell me.
- B. \_\_\_\_\_ invite and listen for ideas and attitudes different than my own, and continuously test the soundness of my own thinking by comparing it with the thinking of others.
- C. \_\_\_\_\_ expect others to keep me informed and show appreciation when they do.
- D. \_\_\_\_\_ isolate and investigate areas of vital concern to me by posing questions in a curious but nonthreatening way.
- E. \_\_\_\_\_ share information in order to see where others stand on an issue; this lets me know whether my own thinking is on track.
- F. \_\_\_\_\_ search for information that suggests all is well, and avoid challenging what others say.
- G. \_\_\_\_\_ am on top of information to be sure that I stay "in the loop" and double check everything I hear to be sure that the information is correct.

22. When it comes to *advocacy*, I \_\_\_\_\_.

- A. \_\_\_\_\_ stand up for my convictions because I know I'm right, and if others oppose me, I try to prove that they are wrong.
- B. \_\_\_\_\_ embrace the ideas of others even though I may have private reservations, because I feel it's better to be supportive than right.
- C. \_\_\_\_\_ feel it is important to express my concerns and convictions so others will know what I am thinking, and change my mind to ideas that are more sound.
- D. \_\_\_\_\_ express my convictions in a cautious way and try to meet others in the middle.
- E. \_\_\_\_\_ tell others what they want or expect to hear.
- F. \_\_\_\_\_ allow others to express their ideas so I can understand where they are coming from and help them see the error in their thinking.
- G. \_\_\_\_\_ keep my own thoughts to myself but respond to questions when asked.

23. When it comes to *decision making*, I \_\_\_\_\_.

- A. \_\_\_\_\_ search for workable decisions that others find acceptable.
- B. \_\_\_\_\_ place high value on making my own decisions and am rarely influenced by what others have to say.
- C. \_\_\_\_\_ search for decisions that maintain good relations and encourage others to make the decisions for me when possible.
- D. \_\_\_\_\_ let others make decisions or else leave it to fate.
- E. \_\_\_\_\_ lobby my point of view to others in order to get "buy-in," which may require persuasion or indirect threat to ensure that my vision is carried out.
- F. \_\_\_\_\_ place high value on arriving at sound decisions; I seek input from others and work toward understanding and agreement.
- G. \_\_\_\_\_ listen to what others have to say, but still strive to have the final say in decisions.

24. When it comes to *critique & feedback*, I \_\_\_\_\_.

- A. \_\_\_\_ place a high value on critique and encourage two-way feedback to strengthen operations.
- B. \_\_\_\_ give informal or indirect feedback to keep productivity high, and make sure I have something positive to say as well.
- C. \_\_\_\_ avoid giving feedback and rarely critique the work of others or myself.
- D. \_\_\_\_ don't hesitate telling people when they are wrong, and avoid having mistakes pinned on me.
- E. \_\_\_\_ give encouragement and offer praise when something positive happens, but avoid saying anything negative.
- F. \_\_\_\_ give others feedback and expect them to appreciate it because it is for their own good.
- G. \_\_\_\_ use critique to motivate and inspire others to further action that I see as important, and tend to discount negative aspects of performance as this lowers the level of enthusiasum.

**Please provide the names of all supervisors responsible for assigning you projects, giving you instruction and evaluating your performance.**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

**ADDITIONAL COMMENTS:**

If there is anything that you feel was not addressed or want to share thoughts on your mind, please take this time to include them in the space provided below.

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**THANK YOU FOR YOUR TIME AND PATIENCE!**

## APPENDIX B

Monday, March 18, 2002

Thank you for taking part in my HUC-JIR graduate research project!

Attached is a questionnaire that I have requested staff members to complete for the purpose of assessing the quality of leadership and management of The Jewish Federation Valley Alliance. The questionnaire data will then be compiled, reviewed and used to determine the most effective intervention strategies required to attain leadership and management excellence. Both the questionnaire data results and intervention strategies will be submitted in the form of a *Valley Alliance Staff Development Proposal*.

I want to assure you that the questionnaire data is 100% confidential. At no point in time will staff members' identities be revealed. What will be revealed are overarching themes, patterns and staff dynamics that reflect the current status of the Valley Alliance.

Once again, thank you for your participation. I hope that the proposal will serve as a useful tool for The Jewish Federation Valley Alliance to continue to advance its mission and achieve established goals.

B'Shalom,

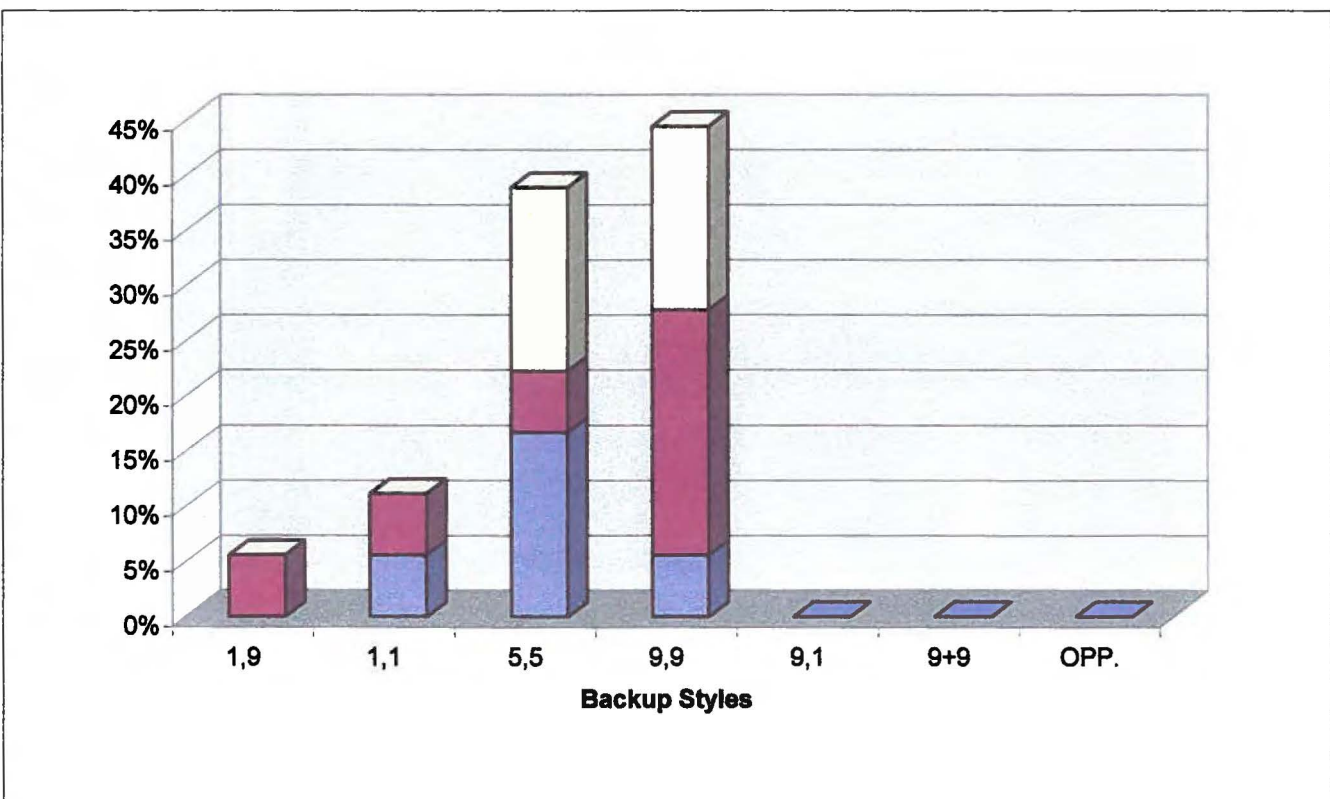
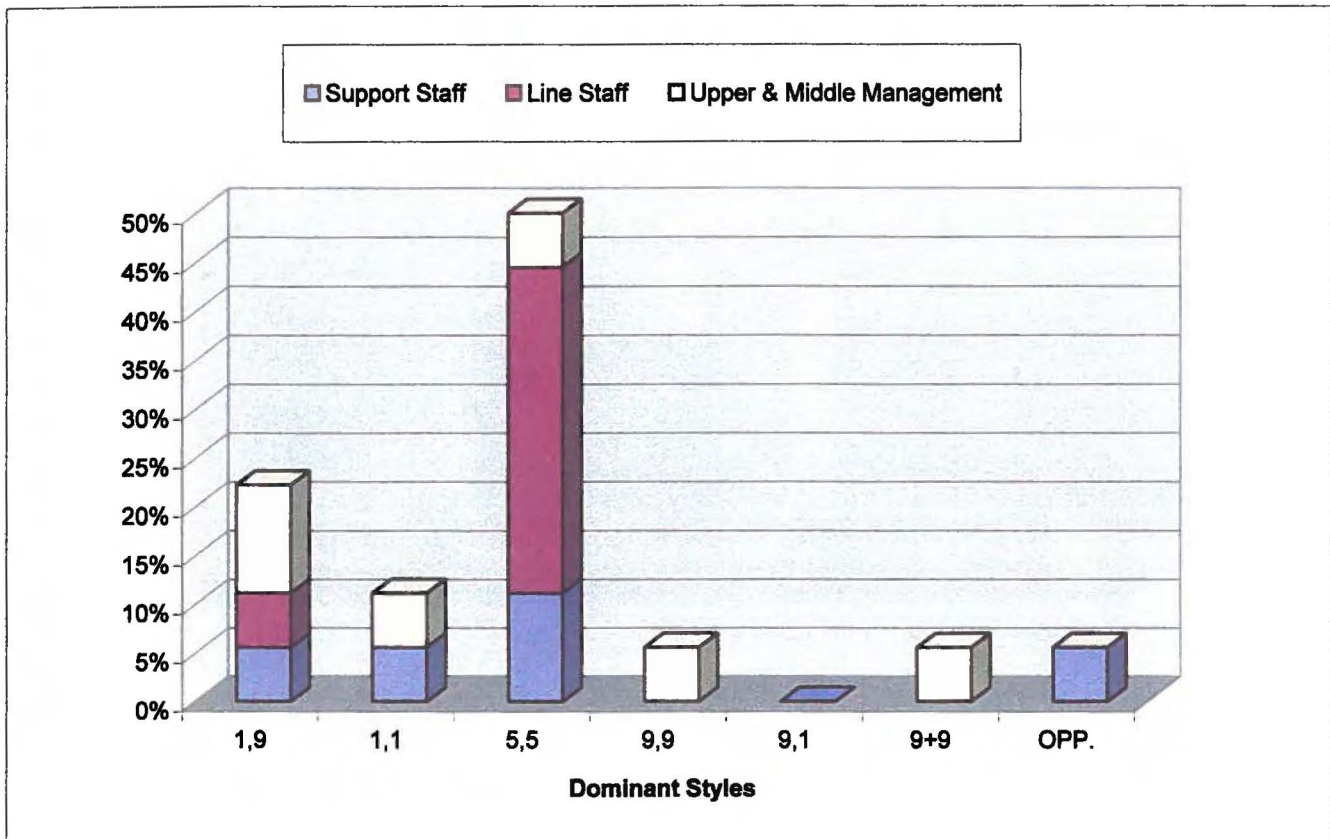
David Appelman  
MAJCS/MSW '02

### INSTRUCTIONS:

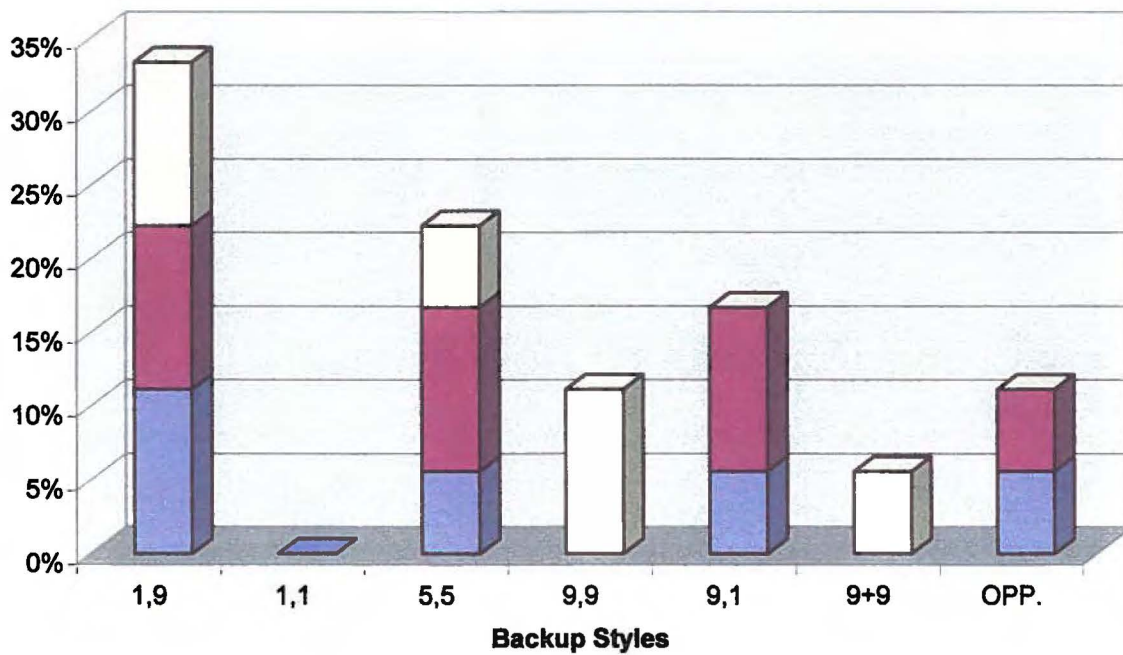
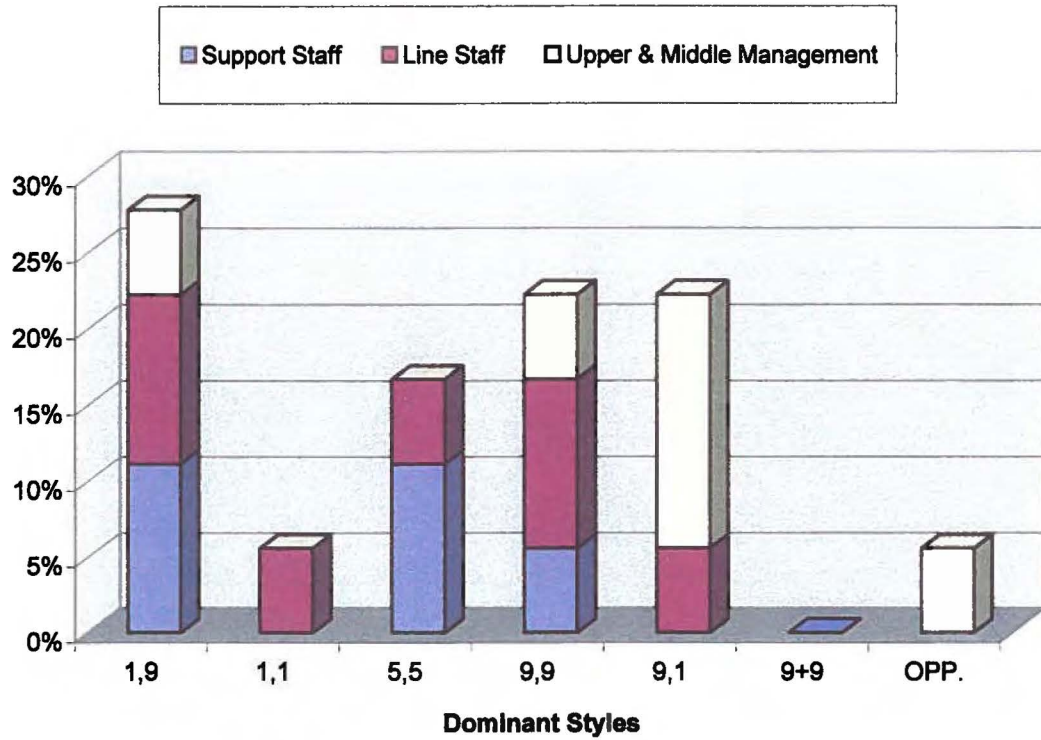
1. Fill out the attached questionnaire. Be sure to do it when you are not busy or being interrupted by anyone else. It should take approximately 20 – 30 minutes. Please be as honest as possible to ensure that the data is accurate.
2. Place and seal completed questionnaire in provided envelope.
3. Return to David Appelman no later than 3:00pm **Friday, March 22<sup>nd</sup>**.
4. I ask that you please not discuss the questionnaire with co-workers until all the questionnaires are returned.



## CONFLICT SOLVING

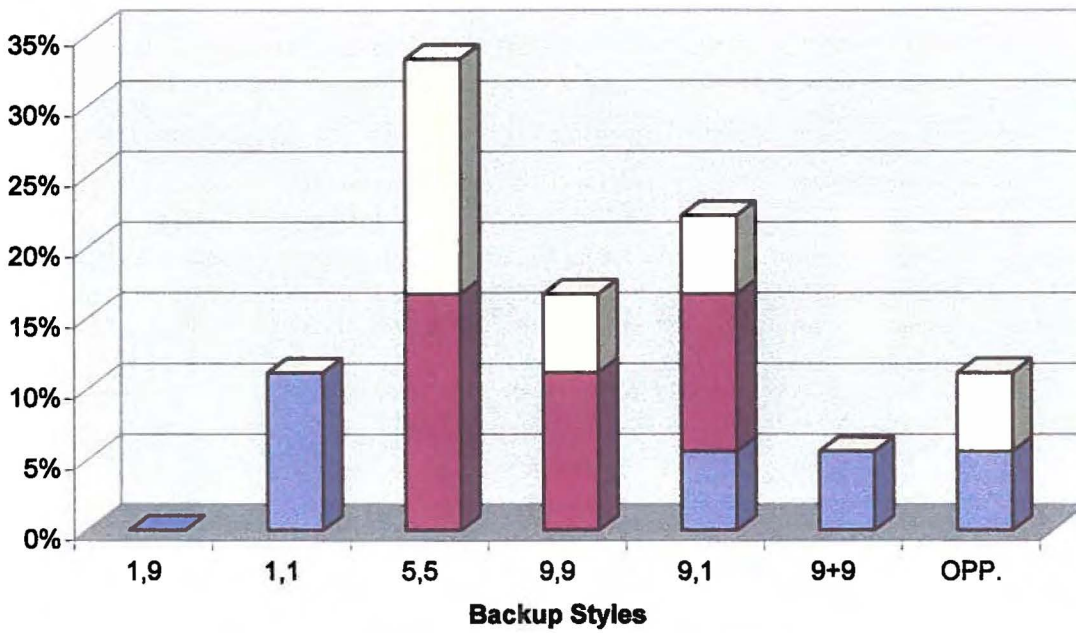
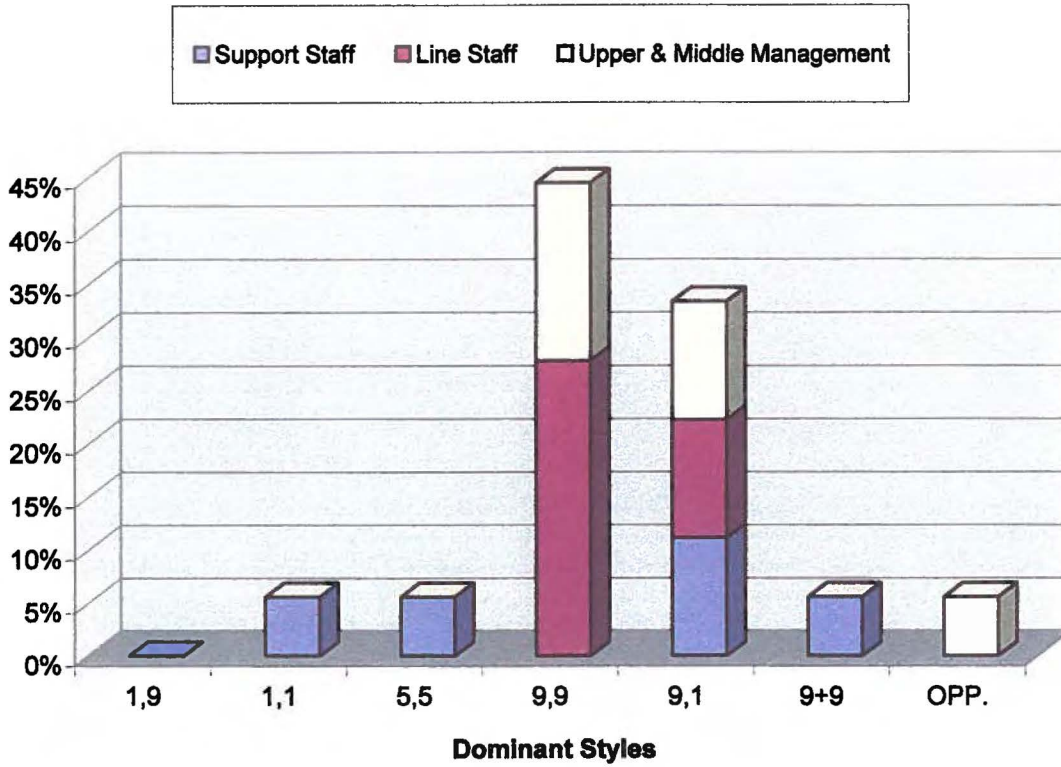


## INITIATIVE

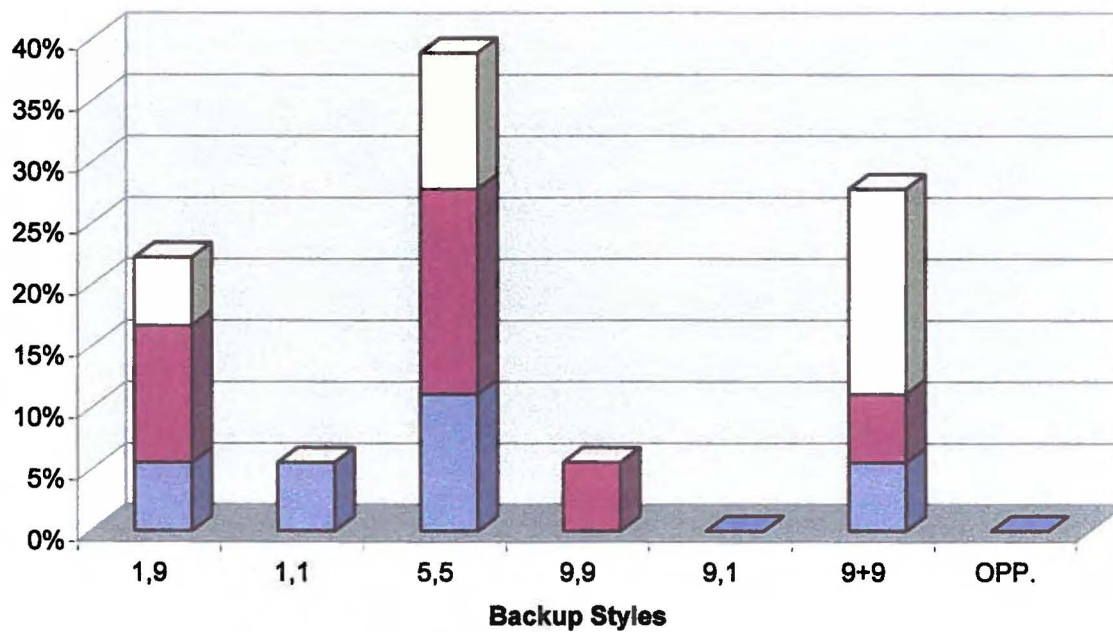
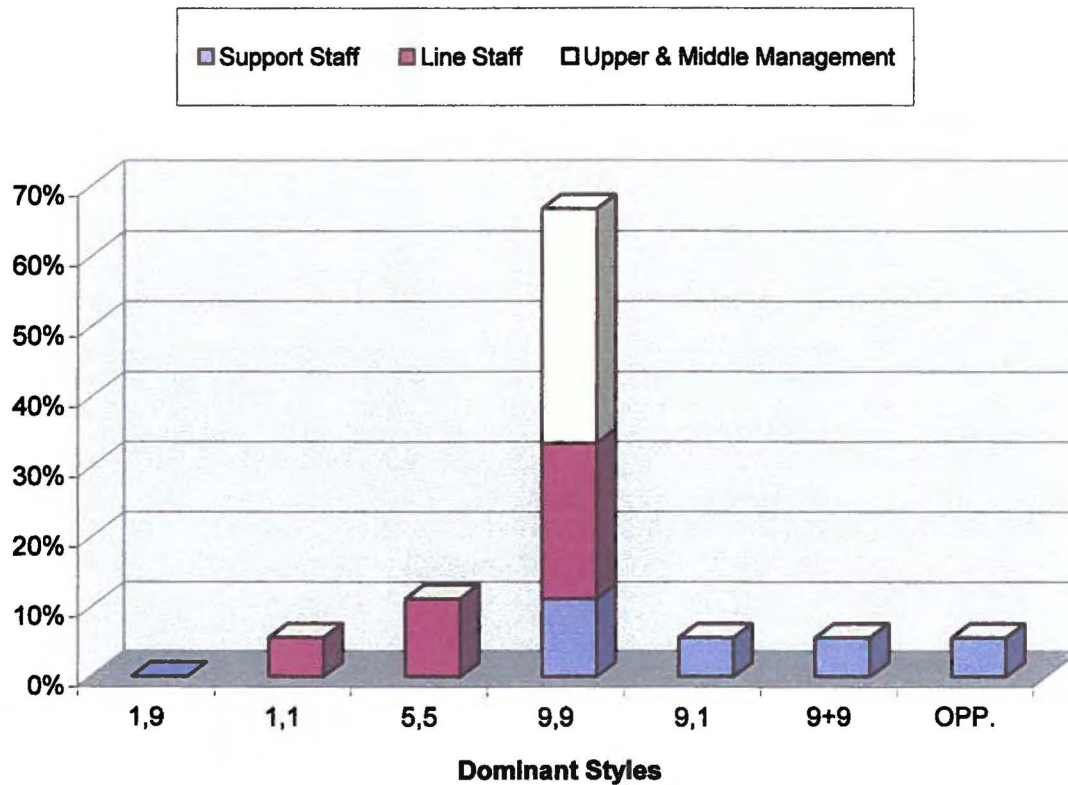




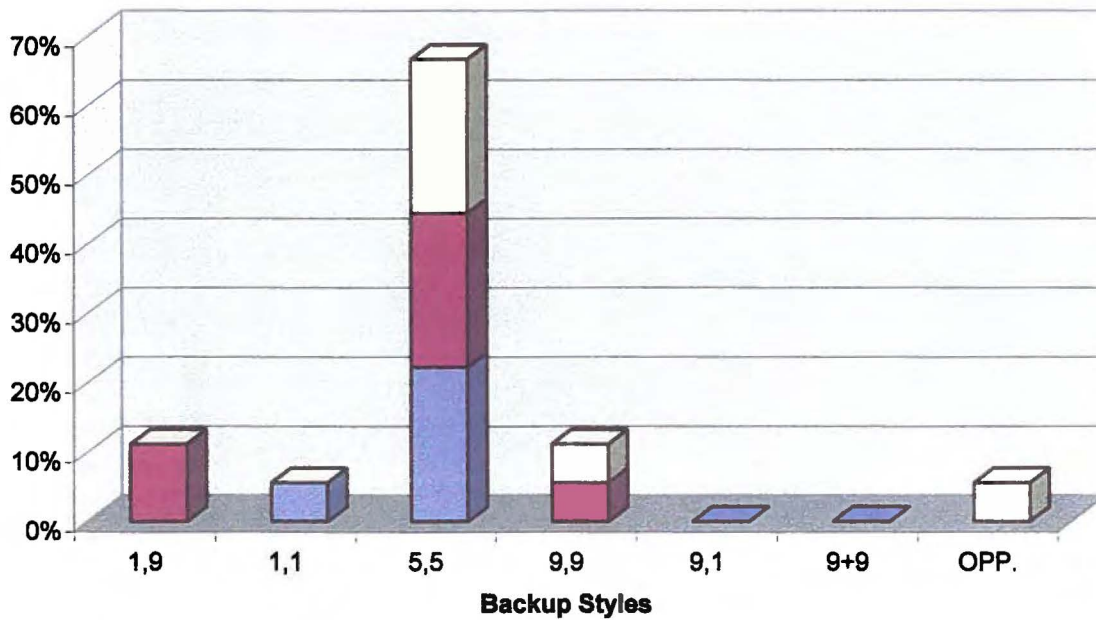
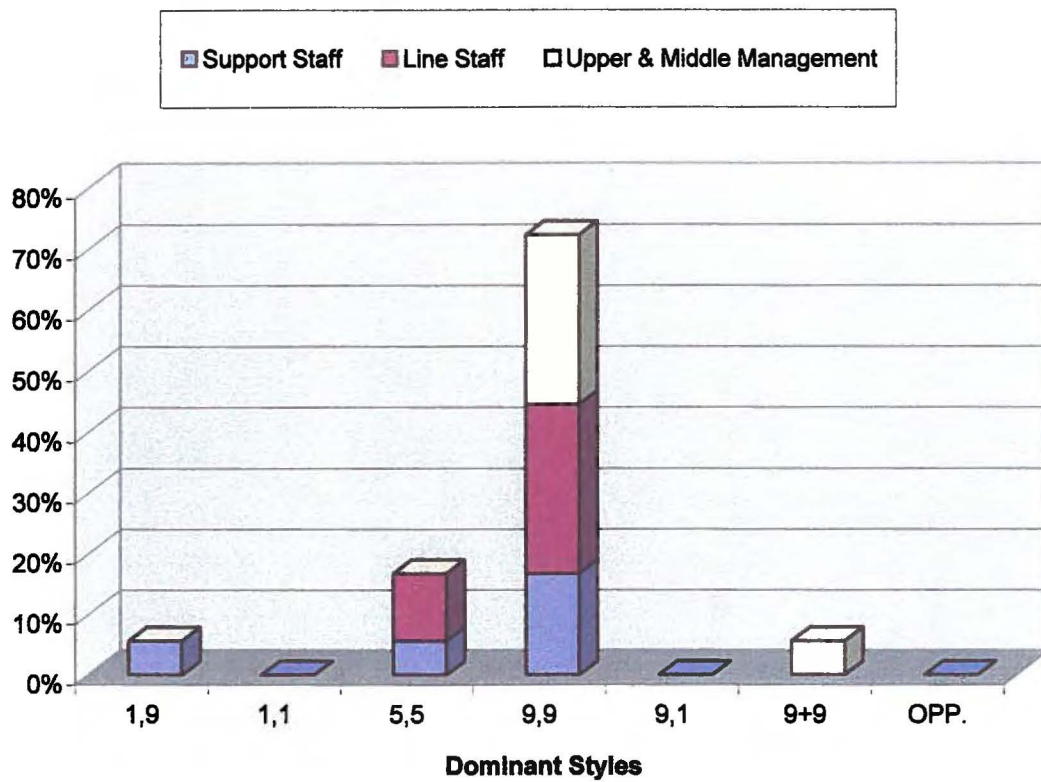
# INQUIRY



# ADVOCACY

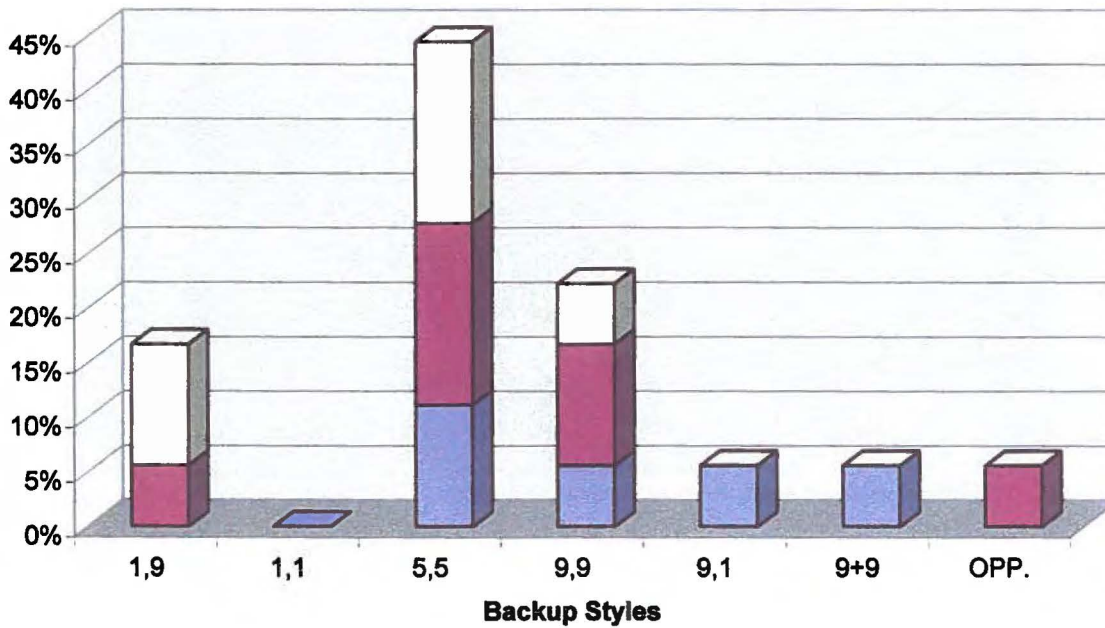
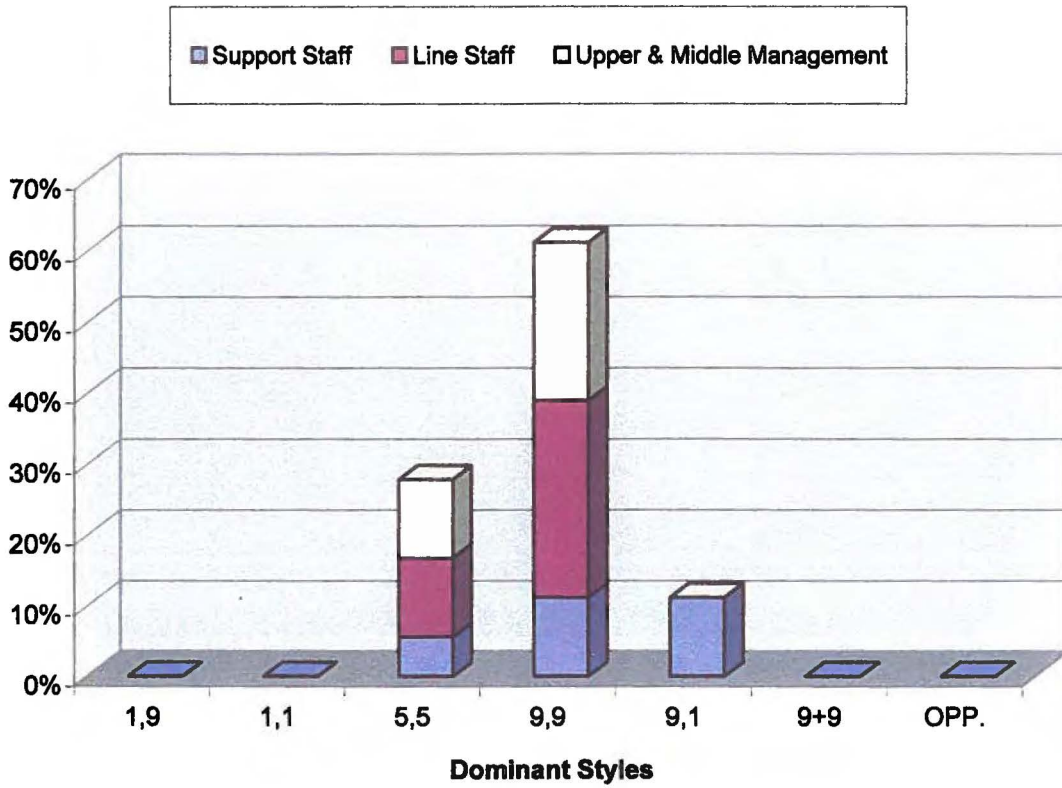


## DECISION MAKING

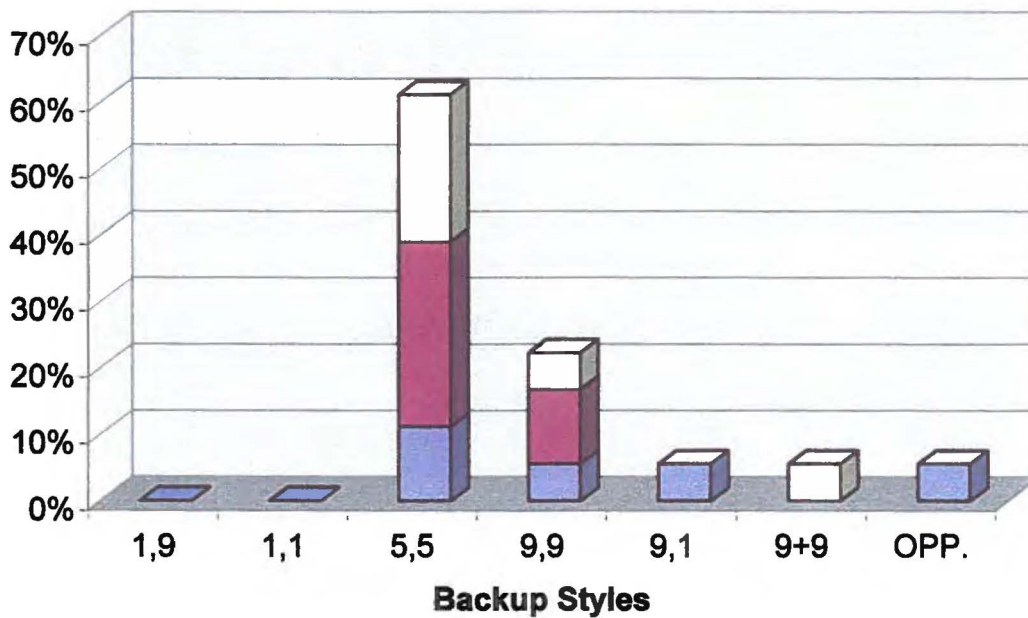
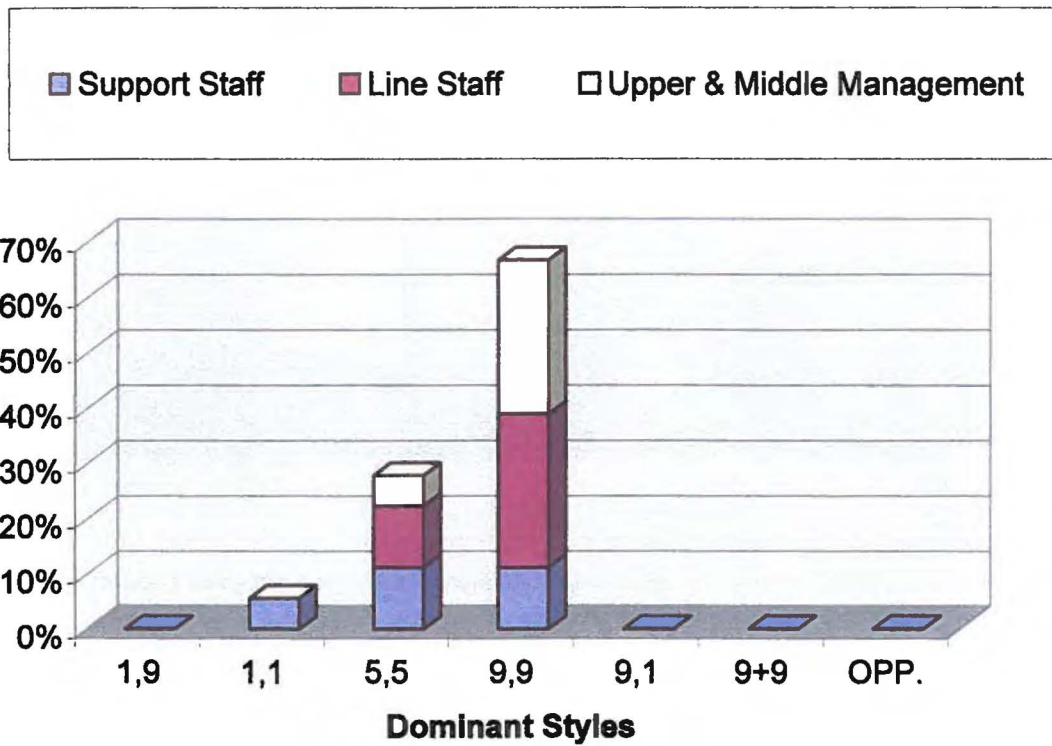




# CRITIQUE



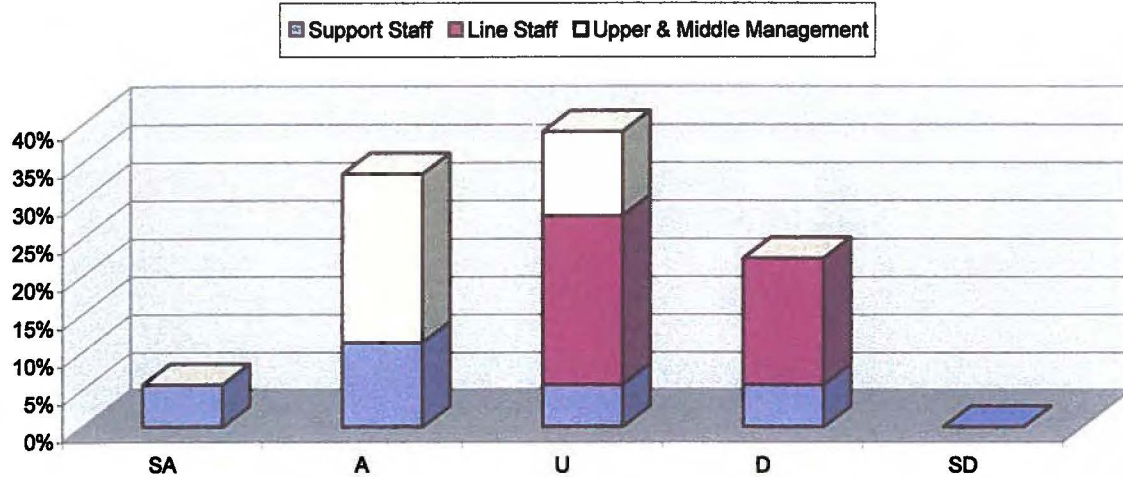
## COLLECTIVE LEADERSHIP STYLES



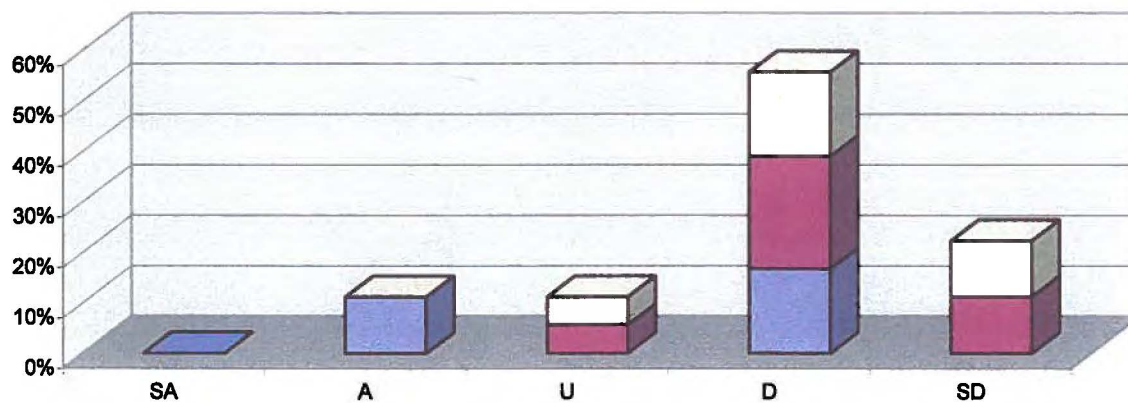


# POWER/AUTHORITY

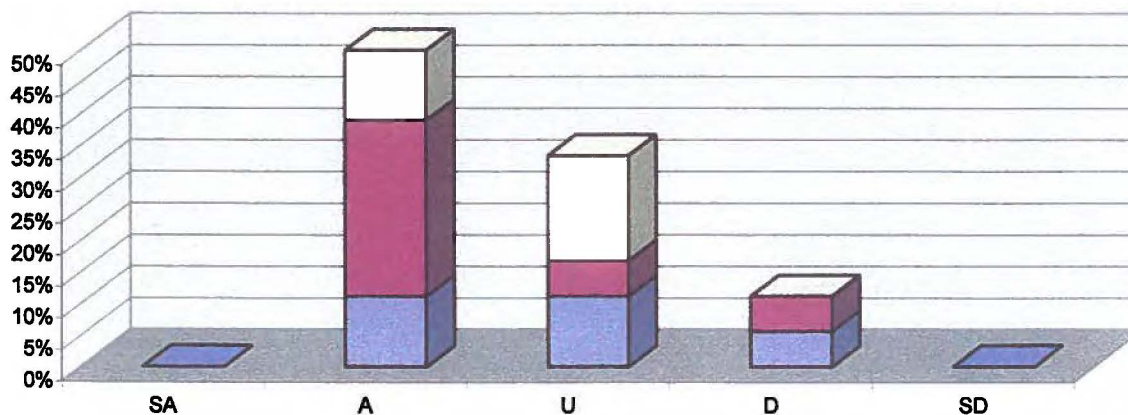
**"Most of the time when I am given an assignment, my supervisor(s) gives me clear and precise instructions."**



**"Often times, I have the urge to express my ideas and opinions to my supervisor(s), but end up holding it inside."**

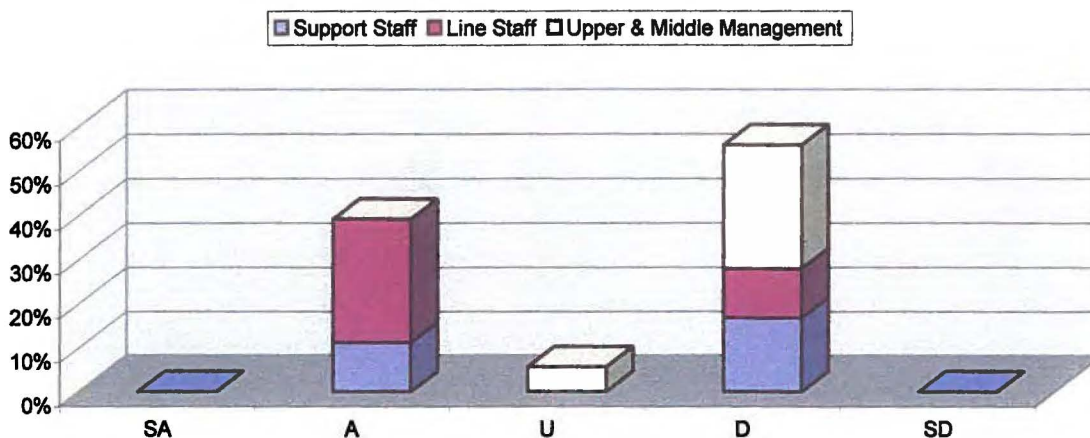


**"The Valley Alliance staff is often frustrated with the lack of coordination when it comes to being productive."**

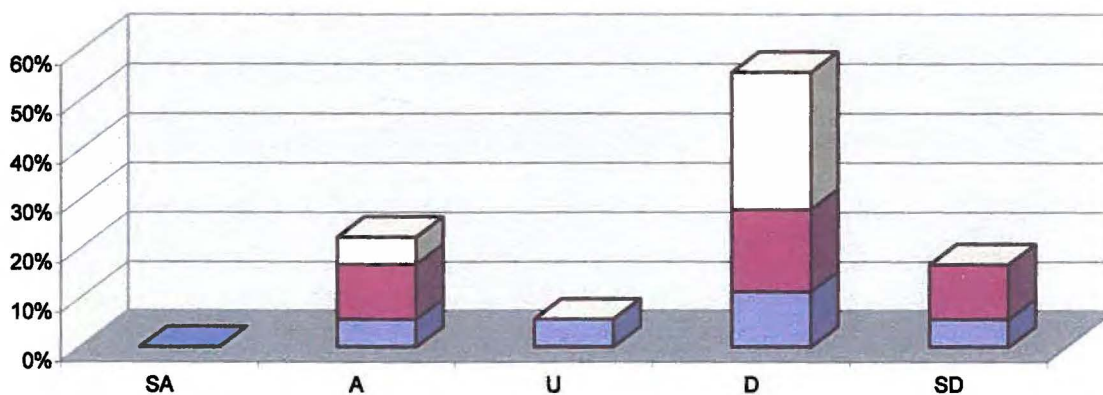


# NORMS/STANDARDS

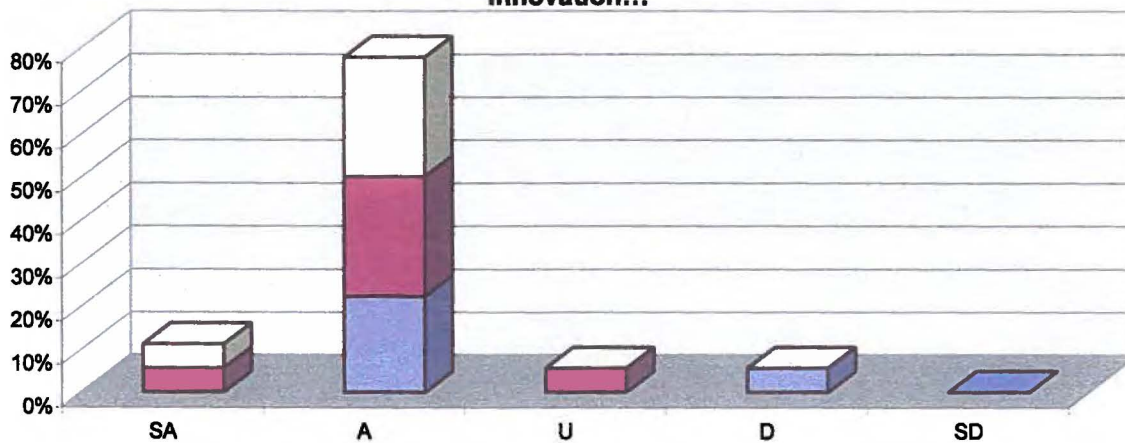
**"I sometimes feel the desire to change the way something is done..."**



**"Sometimes I want to say something, but choose not to because it is considered 'taboo'."**



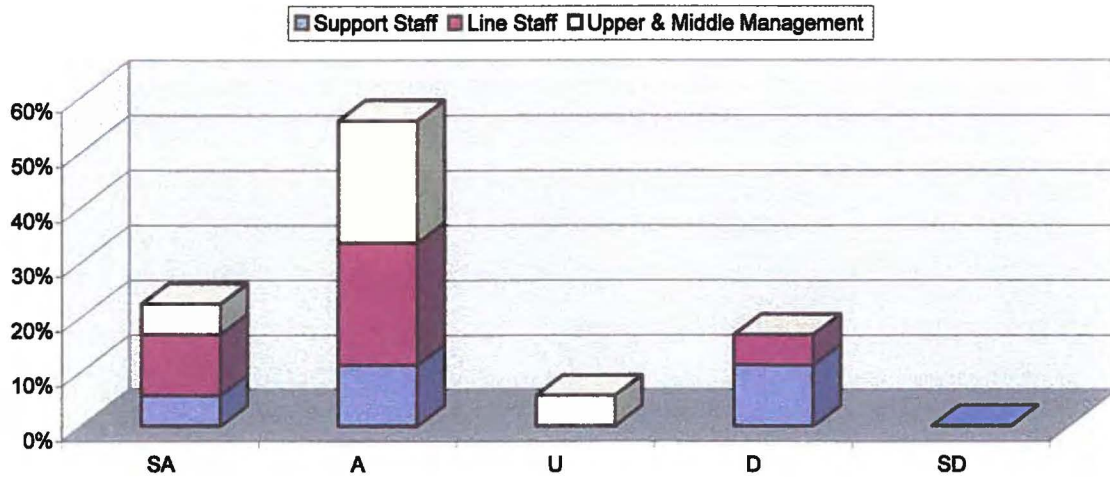
**"The Valley Alliance's working environment promotes flexibility, creativity, and innovation..."**



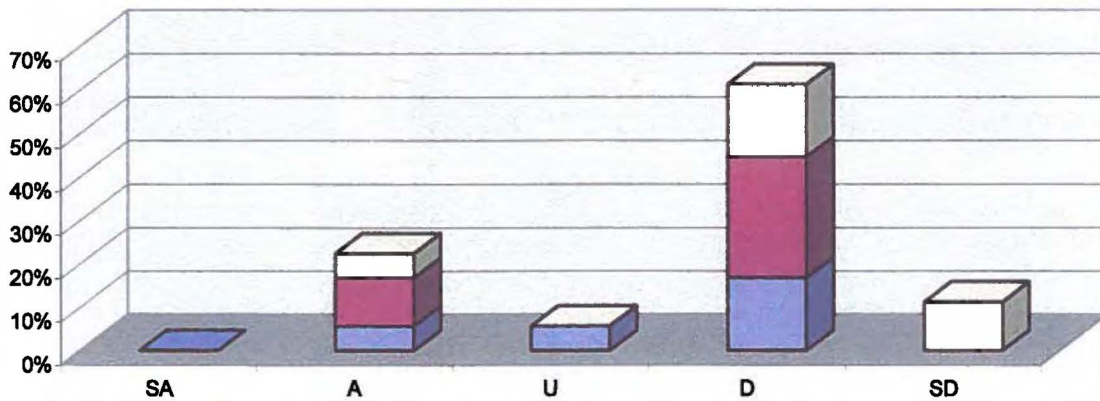


## MORALE/COHESION

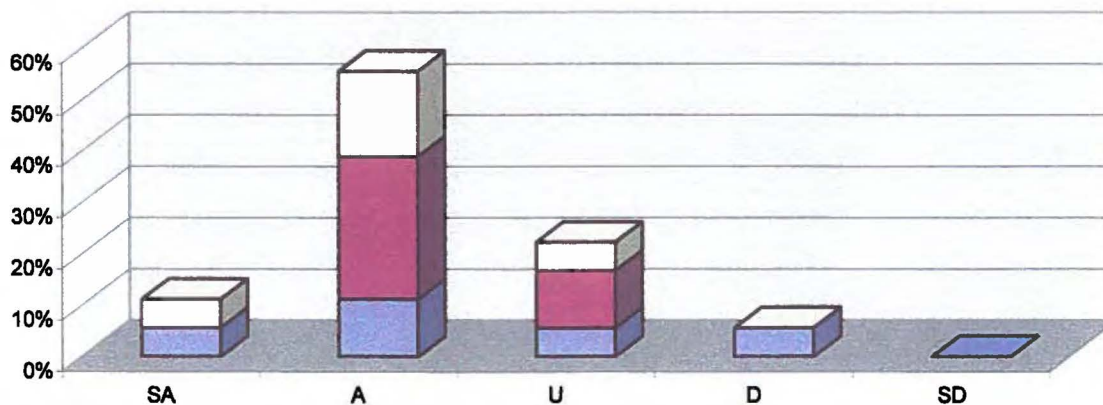
**"I feel my supervisor(s) adequately recognizes and praises me for my efforts and hard work."**



**"I sometimes find myself unmotivated to work with other staff members on a project."**

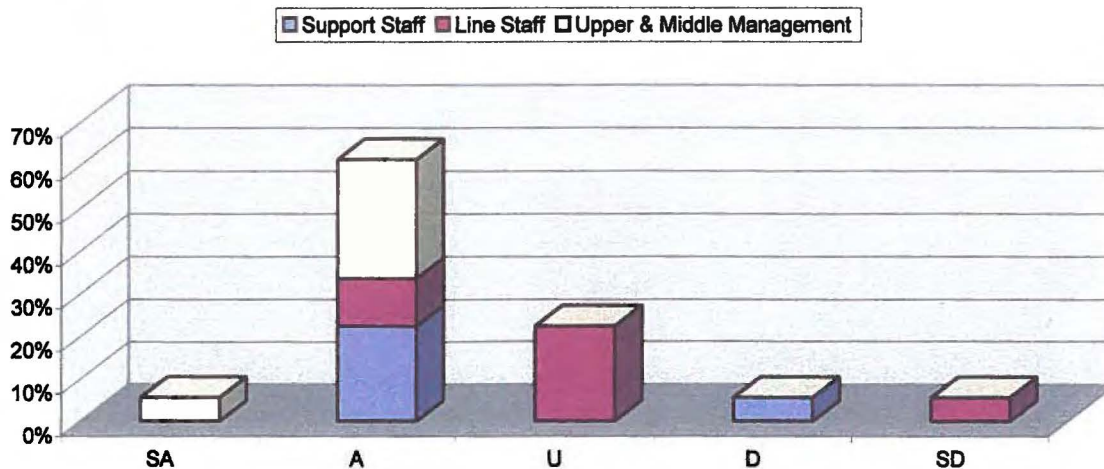


**"The Valley Alliance staff is a cohesive group that truly understands and values the concept of teamwork and interdependence."**

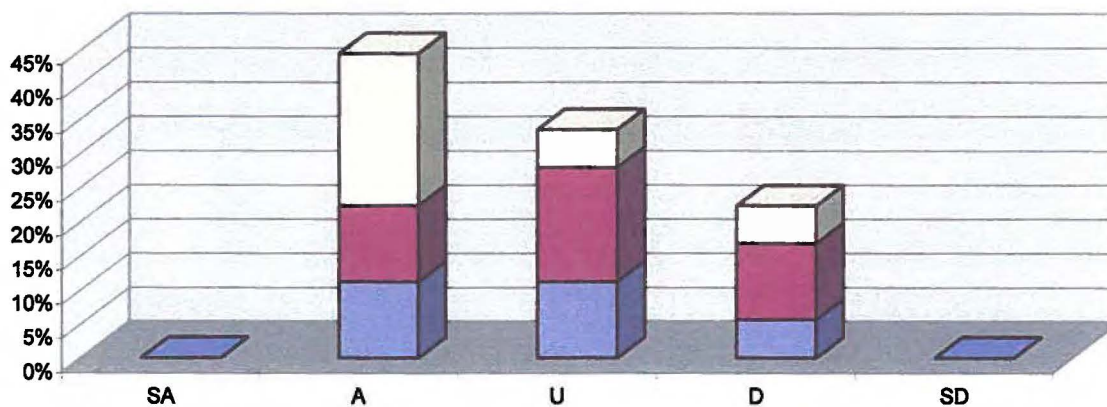


# STRUCTURE/DIFFERENTIATION

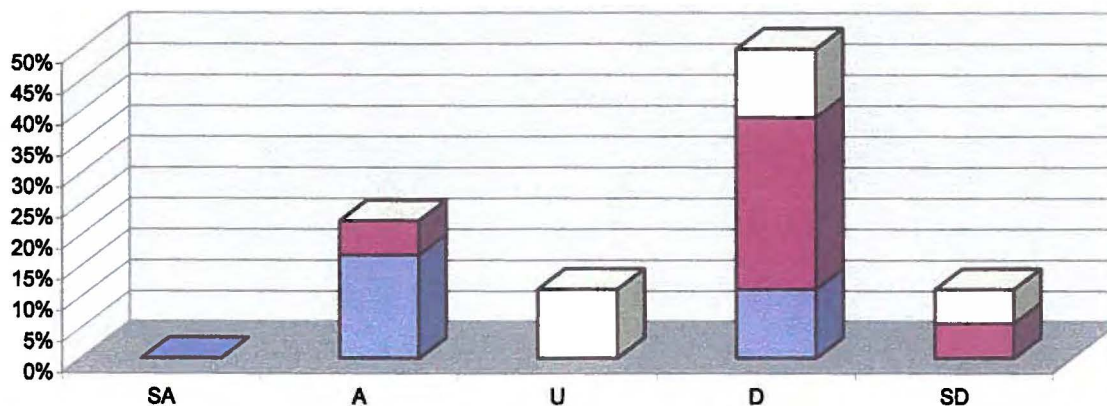
**"My supervisor(s) has provided me with a job description that clearly explains my areas of responsibility."**



**"...the leadership puts forth a conscious effort to make sure individual areas of responsibility are not overlapping and duplicative in nature."**



**"The Valley Alliance has a strong, positive relationship with the Federation (central) that promotes cooperation and coordination..."**

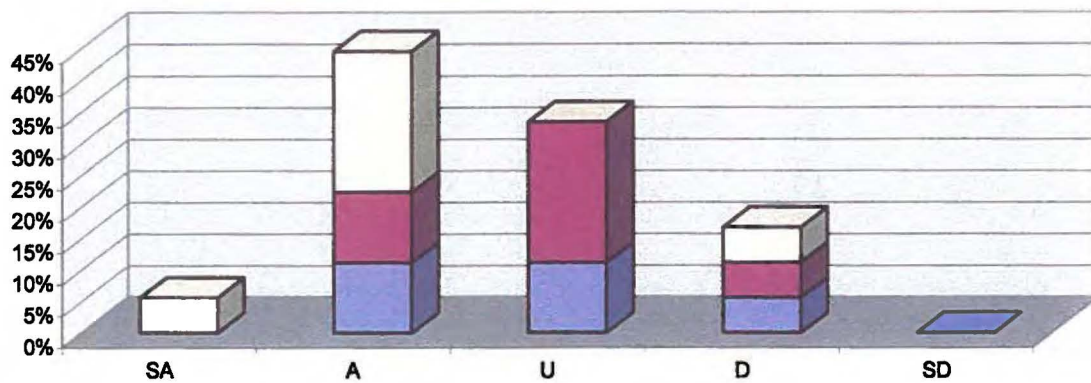




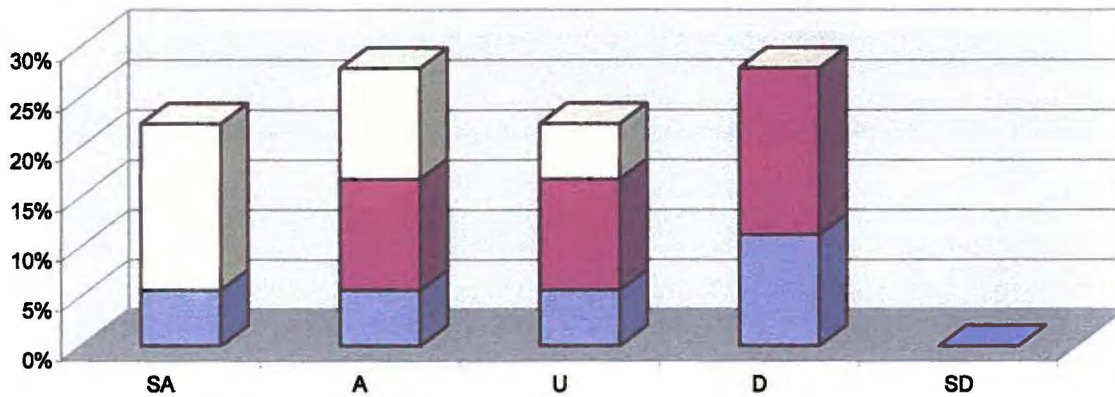
## GOALS/OBJECTIVES

**"I am fully aware of what Valley Alliance's current goals and objectives are, and why they have been chosen."**

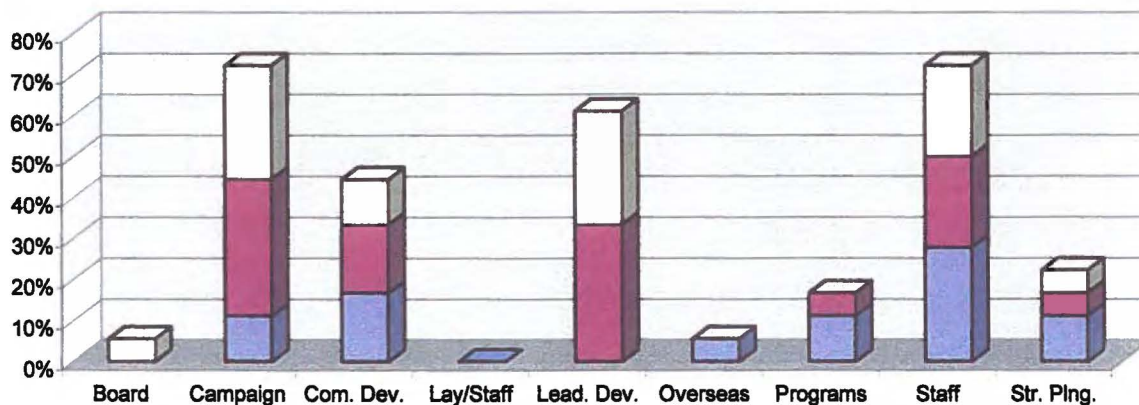
Support Staff
  Line Staff
  Upper & Middle Management



**"I feel like an active participant in the process of goal setting for the Valley Alliance."**

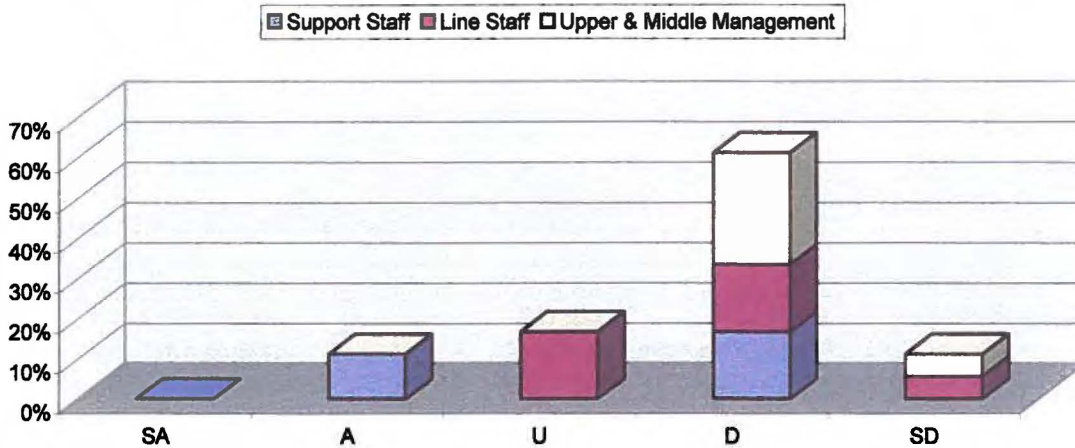


**"The following are the three goals and objectives that I feel should be Valley Alliance's top priority."**

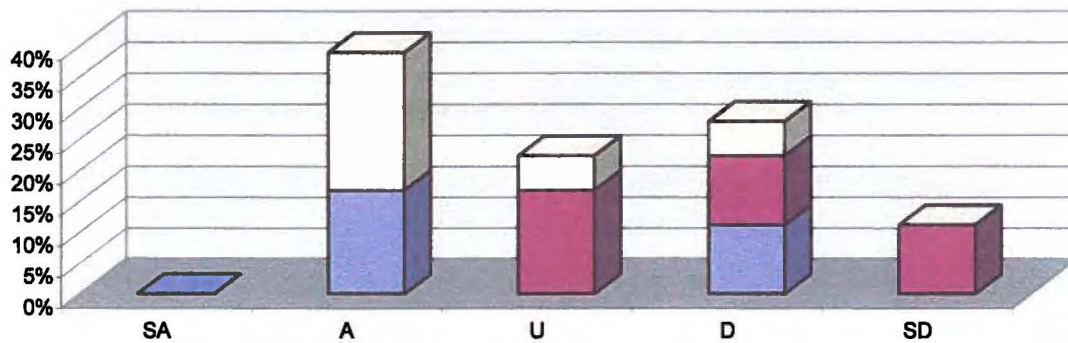


## CRITIQUE & FEEDBACK

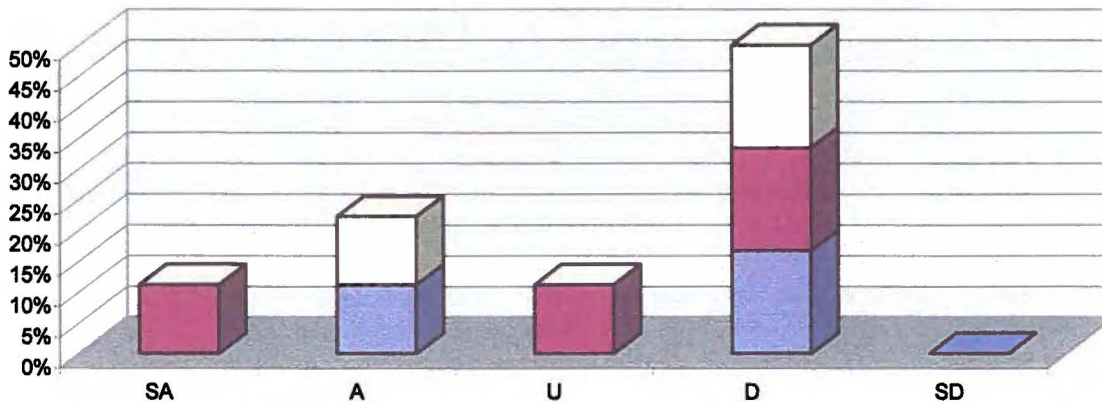
**"I often feel as though any feedback that I give my supervisor(s) is not taken seriously."**



**"The Valley Alliance has a systematic method of receiving critique and feedback from staff and constantly uses it to evaluate the effectiveness of internal operations."**



**"I feel the Valley Alliance is constantly moving from one crisis to another, without ever stopping to reflect and discuss why."**



## APPENDIX D

# Leadership Styles Reference Guide

(Information derived from Blake & McCanse pp. 50-266)

### 1.9 "Country Club Management"

#### ***Motivations & Behavioral Characteristics:***

(+) Desire to Please	Neutral Zone	(-) Fear of Rejection
<ul style="list-style-type: none"><li>• Complimentary</li><li>• Sympathetic</li><li>• Excessive praise</li><li>• Over-trusting</li><li>• Overly helpful</li></ul>	<ul style="list-style-type: none"><li>• "See no evil"</li><li>• People are important</li><li>• Can't say no</li></ul>	<ul style="list-style-type: none"><li>• Highlights the good</li><li>• Dislikes conflict</li><li>• Tells jokes</li><li>• Easily hurt</li><li>• Self-pity</li></ul>

***Conflict Solving:*** "I try to soothe feelings to keep people together."

- Takes disagreement personally.
- It is not the idea or proposal that is rejected, but rather the individual who feels discounted.
- "People must not like me anymore or else they would not reject what I say."
- Opts to be safe by avoiding conflict altogether, or goes along with whatever others say rather than taking a stand.

***Initiative:*** "I initiate whatever actions might help and support the efforts of others."

- Eager to be helpful.
- Fine – tuned senses; eyes and ears pick up on casual impressions and body language and used to determine whether action might gain acceptance.
- Alert to initiatives taken by others, and desires a response in order to gain approval.
- Only motivated by the actions of others, rather than the self.

***Inquiry:*** "I search for information that suggests all is well, and avoid challenging what others say."

- Wants to be "in the know," but does not ask questions for fear of stepping on someone's toes.
- Inquiry tends to be shallow.
- Rather than risk rejection by pressuring others, they may draw conclusions from the situation, usually positively – oriented.
- Waits for information to be provided by others.

***Advocacy:*** "I embrace the ideas of others even though I may have private reservations, because I feel it's better to be supportive than right."

- Unlikely to advocate strong convictions, particularly on controversial subjects.
- Force undertaken is likely to be tentative, nonspecific, or indirect to avoid negative effect on others.
- Reservations are usually unexpressed in order to avoid disrupting good relations.
- Problems remain unsolved, or solutions reached are less than sound.



## APPENDIX D

**Decision Making:** *"I search for decisions that maintain good relations and encourage others to make the decisions for me when possible."*

- Only makes decisions that are likely to be embraced by others.
- When decisions affect several people, group discussion is encouraged to consider and recommend the preferred solution
- Avoids making decisions that are frustrating to others, and delegates them instead.
- When decisions involve taking unpopular action, the result is procrastination.

**Critique:** *"I give encouragement and offer praise when something positive happens, but avoid saying anything negative."*

- Offers positive feedback, making others feel good, in order to keep them motivated to do better.
- Avoids pointing out people's weaknesses or failures.
- Negative feedback is avoided.
- Places blame on others when given negative feedback.

### 1.1 "Impoverished Management"

**Motivations & Behavioral Characteristics:**

(+) Desire to Stay Uninvolved	Neutral Zone	(-) Fear of Termination
<ul style="list-style-type: none"><li>• Volunteers very little</li><li>• Delays action</li><li>• Minimal follow-up</li><li>• "Can't do" attitude</li><li>• Abdicates responsibility</li></ul>	<ul style="list-style-type: none"><li>• Hands – off</li><li>• Neutral</li><li>• "Ostrich" dynamic</li></ul>	<ul style="list-style-type: none"><li>• Robot – like</li><li>• Goes through the motions</li><li>• Keeps out of trouble</li><li>• Pleads ignorance</li><li>• Enough to get by</li></ul>

**Conflict Solving:** *"I maintain a neutral stance or try to stay out of the conflict altogether."*

- Ignores disagreeable situations.
- Takes a bystander or "laissez-faire" approach and responds to conflict by seeking neutrality.
- Makes jokes in the face of conflict.
- Turns their head from people who argue a lot

**Initiative:** *"I apply just enough energy to get by, generally in response to requests from others."*

- Apathetic and unlikely to develop new ideas or courses of action.
- Actions are passive and nonassertive.
- Delegates responsibility to others if possible.
- Avoids taking risks in order to maintain a low profile.

## APPENDIX D

***Inquiry:*** "I rarely ask questions, and usually go along with what others tell me."

- Only inquires on a "need-to-know" basis.
- Is only concerned with information relevant to their own business.
- Information is seen as a defense rather than a means to solve problems.
- Acts like a turtle with its head pulled in... "The less I know about it, the better. That way I can always plead ignorance."

***Advocacy:*** "I keep my own thoughts to myself but respond to questions when asked."

- Is noncommittal and reticent, avoiding spontaneous comments that might reveal some conviction.
- Convictions are expressed that don't hold the individual to a fixed point of view.
- Acknowledges the directions set by others without taking a firm position.
- Avoids taking positions that draw attention to them or carry their signature.

***Decision Making:*** "I let others make decisions or else leave it to fate."

- Avoids decisions, viewing them as not their problem.
- Feels that if decisions are postponed or delayed that they will take care of themselves or just go away.
- Delegation is considered a virtue in that it is a good way to pass the buck.
- Puts decisions off as a matter that lies in the future.

***Critique:*** "I avoid giving feedback and rarely critique the work of others and myself."

- The thought of critique never enters their mind.
- Feels that others should be responsible for judging themselves.
- Their subordinates are free to do what they want, unless their actions lead to conflict.
- If a response is necessary, they make it neutral or say more time is needed.

### 5.5 "Middle of the Road Management"

***Motivations & Behavioral Characteristics:***

(+) Desire to Belong	Neutral Zone	(-) Fear of Humiliation
<ul style="list-style-type: none"><li>• Watches others</li><li>• Knows what's "in"</li><li>• Status conscious</li><li>• Majority viewpoint</li><li>• Tried and true</li></ul>	<ul style="list-style-type: none"><li>• Acceptable progress</li><li>• Conservative</li><li>• Protocol</li></ul>	<ul style="list-style-type: none"><li>• Straddles the issue</li><li>• Uncertain</li><li>• Doesn't rock the boat</li><li>• Cautious</li><li>• Avoids risk</li></ul>

***Conflict Solving:*** "I try to find a reasonable position that everyone can live with."

- Tries to cover up conflict or make it go away.
- Strives to ensure that there are no outright losers when resolving a conflict.
- Avoids disagreeable tension by shifting slightly to accommodate others points of view.
- Focuses all of their attention on compromises.

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**Initiative:** *"I try to maintain a steady pace and focus my attention on accomplishing tasks I have been assigned."*

- The "status quo" is the arena of action.
- Innovative ideas not endorsed by the majority are seen as radical or requiring too much time and effort.
- Strictly follows current traditions, policies, and company practices, because these "rules" provide the means for safe and risk-free conduct.
- Only initiates activities that will gain majority support, and will guarantee success.

**Inquiry:** *"I share information in order to see where others stand on an issue; this lets me know whether my own thinking is on track."*

- Inquiry is cautious and shallow in order to avoid "rocking the boat"
- In order to stay "in the loop," they capitalize on informal conversation to gain important information.
- Frames questions in a vague and indirect fashion, gauges the response, and then reframes the question if resistance is experienced.
- Listens intently, being alert for clues to stay in the know.

**Advocacy:** *"I express my convictions in a cautious way and try to meet others in the middle."*

- Convictions are not strongly expressed in order to avoid confrontation that could risk status.
- Less hesitant to speak strongly on someone else's behalf, whether a boss or the company
- Advocacy is not determined by personal convictions, but by what is politically safe or what sells.
- Bending the truth, half-truths, or white lies are acceptable tactics for getting results.

**Decision Making:** *"I search for workable decisions that others find acceptable."*

- Heavy reliance on precedent to inform decisions.
- Avoids exploring new territory for fear of the unknown.
- Relies on opinion polls and surveys to make decisions, rather than their own thoughts.
- Popularity is the key determinant of decision making rather than objective evidence.

**Critique:** *"I give informal or indirect feedback to keep productivity high, and make sure I have something positive to say as well."*

- Uses positive reinforcement, and avoids negative feedback for it risks "backfire."
- Encloses negative feedback between two forms of positive feedback.
- Feedback is superficial and shallow, and not candid, open, or straightforward.
- Gives feedback one-on-one in order to maintain control and to avoid embarrassment if challenged.

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### 9.9 "Team Management"

#### *Motivations & Behavioral Characteristics:*

<b>(+) Desire for Fulfillment Through Contribution</b>	<b>Neutral Zone</b>	<b>(-) Fear of Selfishness</b>
<ul style="list-style-type: none"><li>• Manages by principle</li><li>• Inspires creativity</li><li>• Problem – Solver</li><li>• Clear expectations</li><li>• Issues in the open</li></ul>	<ul style="list-style-type: none"><li>• Promotes interdependence</li><li>• Shared Values</li><li>• Self/Team responsibility</li></ul>	<ul style="list-style-type: none"><li>• Thinks ahead</li><li>• Thorough</li><li>• Two – way</li><li>• Open to reason</li><li>• Avoids self - interest</li></ul>

**Conflict Solving:** *"I seek out reasons for the conflict in order to resolve underlying causes of tension."*

- Views conflict as an opportunity to gain understanding of what's right.
- Values disagreement for it illustrates individuals' strong convictions about what is right
- Confronts emotions through direct discussion of them with the person(s) involved in the disagreement.
- Moves people away from polarized positions that focus on "Who is right?" and toward focus on the soundest way to proceed.

**Initiative:** *"I exert vigorous effort and others enthusiastically join in."*

- Initiative is exercised in a strong, pro-organizational manner.
- Plans and prioritizes prior to initiating, and then follows through, retesting along the way to ensure soundness.
- Introduces new activities aimed at stimulating productivity, creativity, or satisfaction from work.
- Avoids initiating new activities that divert attention from primary objectives even though they may find them personally interesting.

**Inquiry:** *"I invite and listen for ideas and attitudes different than my own, and continuously test the soundness of my own thinking by comparing it with the thinking of others."*

- Inquiry is comprehensive and in depth, ensuring that all sides of a question are evaluated in a thorough and analytical manner.
- Questions are open-ended to promote further input.
- Written documents are studied in a proactive manner, seeking to understand the underlying logic of the writer.
- Avoids asking questions that merely serve to further personal ends, locking them within a limited perspective.

**Advocacy:** *"I feel it is important to express my concerns and convictions so others will know what I am thinking, and change my mind to ideas that are more sound."*

- Presents information and ideas clearly and without hesitation.
- Does not hesitate moving to positions that offer sounder solutions.
- Avoids taking strong positions that block input from others or that lead to issues being seen from a limited or narrow perspective.
- Encourages others to explore the matter in greater depth before discussing the validity of their ideas

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**Decision Making:** *"I place high value on arriving at sound decisions; I seek input from others and work toward understanding and agreement."*

- Focuses on achieving understanding and agreement among those impacted by the decision.
- Makes decisions that reflect the best available thinking
- Seeks involvement from those whose understanding and commitment is critical to a successful outcome
- Avoids making decisions that divert attention from the main issue or that excludes essential resources.

**Critique:** *"I place a high value on critique and encourage two-way feedback to strengthen operations."*

- Not only focuses on the "what" and "who," but also the "how" and the "why."
- Continually examines what is being done to ensure that the process is as effective as possible at all points from start to completion.
- Is self-critical and receptive to feedback from other team members.
- Views critique as a learning experience.

### 9,1 "Authority – Compliance"

**Motivations & Behavioral Characteristics:**

(+) Desire for Control, Mastery, & Domination	Neutral Zone	(-) Fear of Failure
<ul style="list-style-type: none"><li>• Overbearing</li><li>• Ultimatums</li><li>• Black &amp; White</li><li>• Cuts people off</li><li>• Stubborn</li></ul>	<ul style="list-style-type: none"><li>• Results – Driven</li><li>• Produce or perish</li><li>• People are tools</li></ul>	<ul style="list-style-type: none"><li>• Impatient</li><li>• Argumentative</li><li>• Rejects feedback</li><li>• Fault – finding</li><li>• Distrustful</li></ul>

**Conflict Solving:** *"I try to cut conflict off or win my position."*

- Sees conflict as a threat to managerial control.
- Suppresses conflict by beating others into compliance.
- Sole focus is on results...not excuses.
- Seeks to end a conflict by proving the other wrong.

**Initiative:** *"I drive myself and others."*

- Sees initiative as telling others to do something, to stop doing something, or to do something in a different way.
- Sees asking for help as a weakness.
- Assumes people operate better when they are told what to do.
- Initiates activities that are only seen as guaranteeing success.

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***Inquiry:*** "I am on top of information to be sure that I stay in the loop, and double check everything I hear to be sure that the information is correct."

- Sees knowledge as power and a tool for exercising domination, mastery, and control.
- Questions are direct and limited to factual information.
- Numbers, volume, whether tasks are on schedule and up to specifications are the information; thoughts, opinions, feelings, or recommendations are not.
- Inquiry is based on defensive listening and constant probing for indications of trouble.

***Advocacy:*** "I stand up for my convictions because I know I'm right, and if others oppose me, I try to prove that they are wrong."

- Sees things as black or white.
- Makes "absolute" statements that convey the notion *always*, *never*, *impossible*, or *everyone* are the rule rather than the exception.
- Makes sure that others can't challenge them on what is said.
- Belittles other viewpoints to cast doubt on their validity.

***Decision Making:*** "I place a high value on making my own decisions and am rarely influenced by what others have to say."

- Believe that they have the required resources, such as knowledge, experience, or authority to make the decision.
- Others are unlikely to be consulted prior, and are involved only in terms of carrying out the decision.
- Decisions are individual and unilateral.
- Expects others to carry out the decisions made.

***Critique:*** "I don't hesitate telling people when they are wrong, and avoid having mistakes pinned on me."

- Critique is the same as criticism and correction, and seldom contains a constructive component.
- Thinking through the activity as a way of learning from it is not an option.
- Quick to point out and correct performance problems.
- Takes the offensive when blamed, seeking to put the blame on someone else.

### 9+9 "Paternalism"

#### ***Motivations & Behavioral Characteristics:***

(+) Desire for Veneration	Neutral Zone	(-) Fear of Repudiation
<ul style="list-style-type: none"><li>• Graciously demanding</li><li>• Patronizing</li><li>• Gives advice</li><li>• Preachy</li><li>• Condescending</li></ul>	<ul style="list-style-type: none"><li>• Influential</li><li>• Virtuous</li><li>• Authoritative</li></ul>	<ul style="list-style-type: none"><li>• Disapproving</li><li>• Withholds rewards</li><li>• Judgmental</li><li>• Disowns bad children</li><li>• Resents challenge</li></ul>

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**Conflict Solving:** *"I acknowledge conflict but continue to focus on the importance of expressing my point of view."*

- Uses the tool of "reward for obedience" and control through "punishment and reprimand."
- Tolerates disagreement in order for "unruly children" to blow off steam, but cuts it off when it is time to "get down to business."
- Expects agreement based on loyalty and doesn't hesitate to use guilt and reprimand to bring people into line.
- Strives to create subordinates in their own image and likeness.

**Initiative:** *"I expect others to follow my lead and extend praise to those who support my effort."*

- Exercises strong initiative until it is felt that subordinates can be trusted to operate independently.
- *Pseudo-delegation:* expects subordinates to check back with them when anything out of the ordinary arises, rather than acting on their own.
- Desire to "educate" subordinates around initiatives in order for them to "follow in their footsteps."
- Avoids introducing activities that are shaky and that might run the risk of causing loss of credibility and respect.

**Inquiry:** *"I expect others to keep me informed and show appreciation when they do."*

- Much inquiry is focused on ensuring that things are going according to expectation or to previously formed conclusions or judgments.
- Utilizes "Socratic" supervision – relies on questions as a primary teaching tool to determine if the other person can respond correctly.
- Asks questions designed to bring others around to their way of thinking.
- Avoids being caught without the facts because it may result in lack of respect or loss of following.

**Advocacy:** *"I allow others to express their ideas so I can understand where they are coming from and help them see the error in their thinking."*

- Expresses strong convictions intensely, often with an overtone of moralism as in *should's* and *should not's*, or *ought's* and *must not's*.
- Takes positions that build his or her image of credibility.
- Avoids taking positions that indicate uncertainty or doubt, or that may prove damaging to their credibility with others.
- Desperately forces team agreement in support of own convictions.

**Decision Making:** *"I listen to what others have to say, but still strive to have the final say in decisions."*

- Sees himself or herself as the sole decision maker.
- Delegated tasks come in the form of teaching, coaching, counseling, and guidance to ensure the task is fully understood and accepted.
- Provides convincing arguments that demonstrate how these decisions are for everyone's own good and that reflect favorably on his or her wisdom and judgment.
- Avoids making decisions that might be challenged by others in a way that could lead to loss of respect.



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**Critique:** *"I give others feedback and expect them to appreciate it because it is for their own good."*

- "Spoon-feeds" critique points to subordinates to make sure each point is digested and appreciated before introducing the next one.
- Becomes irritated and uncomfortable when subordinates are resistant to feedback, providing rationalizations or defensive statements.
- Is easily disappointed when subordinates don't follow the rules that have been explained to them.
- Communicates his or her personal disappointment, and induces feelings of guilt as a form of punishment.

### Opportunism

**Motivations & Behavioral Characteristics:**

(+) Desire to be on top	Neutral Zone	(-) Fear of exposure
<ul style="list-style-type: none"><li>• Self – serving</li><li>• Manipulative</li><li>• Creates obligations</li><li>• Pulls strings</li><li>• Street smart</li></ul>	<ul style="list-style-type: none"><li>• Isolates enemies</li><li>• Plays the angles</li><li>• "Showperson"</li></ul>	<ul style="list-style-type: none"><li>• Sows seeds of doubt</li><li>• Two – faced</li><li>• Rationalizes</li><li>• Dishonest</li><li>• Conniving</li></ul>

**Conflict Solving:** *"I put forth effort to avoid conflict, and also prevent getting caught head on."*

- Avoids conflict because it is seen as something that can lead to adverse consequences.
- Constantly reads a situation to determine probable consequences.
- Circumvents conflict by supporting the positive and avoiding the negative.
- Operates in such a manner as to avoid being defeated, but equally to avoid causing others to experience defeat.

**Initiative:** *"I initiate actions that are in my own best interest by seeking a trade-off with others."*

- Identifies a desired end and then targets all the key players needed for accomplishing the task.
- Exercises caution when taking initiative, and determines most effective approach with others to achieve desired goals.
- Does his or her homework before making an initiative public.
- Builds a coalition of supporters in advance of a public meeting.

**Inquiry:** *"I isolate and investigate areas of vital concern to me by posing questions in a curious but nonthreatening way."*

- Strong desire to know everything that is going on in order to use the knowledge as "leverage" with others.
- Engages in constant verification, validation, and reassessment of his or her current knowledge.
- Utilizes third party information through informal systems of communication to verify, cross-check, and spot contradictions with second party information.
- Avoids asking questions that might indicate only being interested in self-gain

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**Advocacy:** *"I tell what others what they want or expect to hear."*

- Avoids spontaneous interaction not to risk "revealing" their true thinking or underlying motives.
- Diagnoses a situation in advance in order to determine what style of behavior will most likely achieve desired results.
- When promoting an idea, he or she will ascertain proponents and adversaries in advance, and then court proponents to gain support before making the idea public.
- Does not hesitate expressing convictions on issues that have no immediate pertinence.

**Decision Making:** *"I lobby my point of view to others in order to get 'buy-in,' which may require persuasion or indirect threat to ensure that my vision is carried out."*

- Decisions are made that are likely to get what he or she wants.
- Avoids making decisions that might be countered or subject to criticism, and defers taking action instead.
- Subtle manipulation spurring uncertainty is used when it looks like a group decision is going to be made that doesn't favor his or her desired outcome.
- Immediately supports decisions when it serves his or her desired outcome.

**Critique:** *"I use critique to motivate and inspire others to further action that I see as important, and tend to discount negative aspects of performance as this lowers the level of enthusiasm."*

- Customizes the critique based on the positive and negative motivations of others.
- Uses critique to "neutralize" disagreement and conflict.
- Hesitates offering spontaneous critique for fear of alienating potential alliances.
- Uses critique only as a means of finding out how to improve interaction with another individual on some future occasion.

## APPENDIX E

### The Jewish Federation Valley Alliance Template For Action Spring 2002

#### OVERARCHING GOAL:

*To cultivate a work environment that fosters and values leadership and management excellence.*

#### CORE OBJECTIVE 1: Identify system barriers prohibiting leadership and management excellence.

- Process Objective A:** Engage staff in discussions regarding the results of the questionnaire.
- Process Objective B:** Identify system barriers at the individual, staff, and organizational level based on staff discussions.

#### CORE OBJECTIVE 2: Create and implement an action plan designed to eliminate system barriers.

- Process Objective A:** Establish an operating body designed for the purpose of creating and implementing the action plan.
- Process Objective B:** Determine and prioritize the most effective strategies to address identified system barriers.
- Process Objective C:** Develop a timeframe that is synchronized with other staff and organizational goals and objectives.
- Process Objective D:** Implement action plan.

#### CORE OBJECTIVE 3: Evaluate progress and preserve methods that improved the quality of leadership and management.

- Process Objective A:** Determine success indicators for eliminating system barriers.
- Process Objective B:** Determine methods and frequency of evaluations.
- Process Objective C:** Conduct, compile, and examine evaluation data.
- Process Objective D:** Modify future action plan based on data results and staff discussions.

## APPENDIX F

### Specific Areas of Focus

**SYSTEM BARRIER 1:** The majority of individual backup leadership styles are 5,5 (see Appendix D for characteristics).

**Objective:** Increase staff's ability to maintain a 9,9 style of leadership (see Appendix D for characteristics) when under pressure.

**Strategy A:** Use the Leadership Grid to educate staff and to increase their ability to adapt to diverse leadership styles.

**Strategy B:** Provide each staff member with a copy of Blake & McCauley's *Leadership Dilemmas-Grid Solutions*.

**Strategy C:** Create opportunities for staff to discuss personal backup styles of self and others.

**SYSTEM BARRIER 2:** The staff as a whole lacks cohesion, which prohibits the full potential for quality teamwork.

**Objective:** Increase staff cohesion and its ability to operate as a unit.

**Strategy A:** As a team, have staff develop a vision statement for the Valley Alliance.

**Strategy B:** Increase recognition and praise at every staff level.

**Strategy C:** Increase staff ownership of change efforts.

**Strategy D:** As a team, have staff determine methods designed to foster a safe environment that encourages discussion regarding the following: supervision, planning, controversial topics, and negative feedback.

**Strategy E:** Create opportunities for staff to socialize on an informal level.

**Strategy F:** Design various team building exercises based on Blake & McCauley's six dimensions of team building.

**SYSTEM BARRIER 3:** An insignificant amount of staff reflection exists.

**Objective:** Increase the staff's ability to engage in self and staff reflection.

**Strategy A:** Develop mechanisms designed to utilize critique and feedback such as:

- A 15-20 minute window of staff meeting time entitled *Reflections*.
- Continual staff lunches geared to discuss team building aspects.
- An anonymous comment box designed to allow staff to express personal opinions and observations.

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**SYSTEM BARRIER 4:** The Valley Alliance is absent of formal processes and structures that create and sustain leadership and management excellence, such as reviewing policies and procedures, assigning job responsibilities, and utilizing provided critique and feedback.

**Objective:** Establish formal processes and structures that will increase the quality of leadership and management excellence.

**Strategy A:** Create (and modify) policies and procedures that will enhance the quality of leadership and management.

**Strategy B:** Re-evaluate and develop written job descriptions.

**Strategy C:** Develop mechanisms that will stimulate and utilize *critique* and *feedback* at every staff level.

**SYSTEM BARRIER 5:** Staff is protective of The Valley Alliance image, which is prohibiting objective self-critique.

**Objective:** Increase staff's ability to identify and address this behavioral pattern.

**Strategy A:** Utilize the questionnaire data as a method of generating staff discussion.

**Strategy B:** Compile a list of The Alliance's strengths and weaknesses generated by staff, identify contradictions, and then explore and discuss reasons/causes.

**SYSTEM BARRIER 6:** An "US versus THEM" mentality between the Valley Alliance and 6505 exists.

**Objective:** Increase efforts that will enhance the working relationships with 6505.

**Strategy A:** Engage staff in discussions regarding this dynamic and identify methods for improving.

**Strategy B:** Encourage The Valley Alliance and 6505 to increase the levels of collaboration.



## Implementation Timeframe

