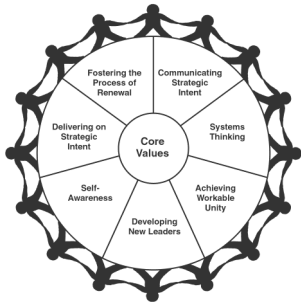


Leadership Institute



CENTER FOR
**Legal Aid
Education**

Institute Philosophy and Approach

Under the guidance of a design team made up of both senior legal services leaders and a diverse group of younger emerging leaders, CLAE's Leadership Institute is the product of a multi-year process of design, reflection, delivery and redesign; everyone involved seeks a framework to make leadership development in the legal services community an achievable goal.

Previously, CLAE designed an initial Leadership and Justice curriculum for delivery in a single event for members of its New England Legal Services Training Consortium. This effort was evaluated and additional components added to the mix. A more ambitious year-long Institute was proposed and designed. The first delivery of this year-long Institute ended in the fall of 2007. From this process of discovery, experimentation, evaluation and reflection, a thoughtful

and explicit approach to leadership development has emerged, one that is grounded in our community's values and demonstrably effective. It can be refined and revised for your state or region with your active input and involvement, and delivered there.

The Leadership Institute has four central components:

- A **core curriculum** that looks at leadership

through the lens of a set of core leadership competencies. The curriculum explores each of these competencies conceptually and also offers sessions on concrete practical tools associated with each. Additional material in this pdf details the competency framework, the content of the curriculum and the activities associated with it.

- Each Leader-in-training (we call them Leadership Fellows) is **paired with a mentor** from a different legal services program who matches the emerging leaders needs in terms of interests and expertise.



Each onsite retreat includes work time for mentors and fellows to engage on the curriculum and work through the fellows leadership initiative progress and leadership development plans

- Each Fellow determines with their program a **leadership initiative** that they will invent, plan, carry out and evaluate during the Institute. This project, designed to be one of value to their program and clients, becomes the

laboratory for active experimentation with the skills learned in the Institute. Because the Fellow has access to ongoing mentoring and support throughout the process of undertaking their initiative, success rates are high, and both confidence and program credibility are gained by the emerging leaders, while a significant program or client community problem is addressed creatively and effectively.

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- Each Fellow also develops, in conjunction with the Institute and their mentor, a **leadership development plan** setting out the additional training, experience and opportunities needed to advance their leadership goals. The Fellow operates under this plan both during and after the Institute.
- Ensures maximum, appropriate stakeholder involvement in problem-solving, strategy development and decision-making;
- Increases likelihood of success by developing concrete project plans;

The CLAE Leadership Institute philosophy is premised on important assumptions about what leadership means and should mean in our community. Specifically, this Institute is focused on the practice of “**facilitative leadership**.” By which we mean a particular form of leadership that:

- Is not based on positional power and absolute authority but rather on mutual respect and commitment;
- Involves people *wanting* to participate in the leader’s initiatives, not having to;
- Is characterized by meaningful engagement and involvement of the entire team responsible for an initiative, with power, authority, responsibility and accountability broadly and fairly shared;
- Includes effectively communicating a vision in a fashion that motivates others, captures their imagination and inspires hope, and then letting that vision be further shaped by others;
- Is effective in carrying out an initiative through careful analysis and planning to arrive at appropriate work plans and solutions;

- Leaves participants in the effort with the ultimate feeling that they were responsible for the positive result achieved and that the initiative was theirs.

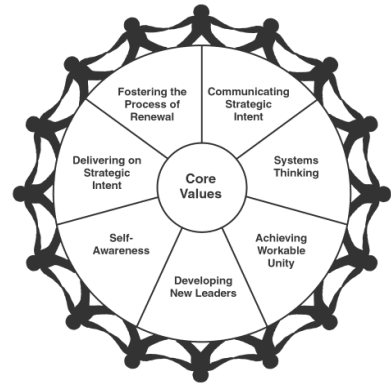


The Leadership Institute is a forum for active discovery. Lectures are kept to a minimum and the emerging leaders focus is on exercising and testing their leadership potential and leadership

“The leadership Institute has given me the confidence to believe I am a leader and the skills I learned from the Institute have made me a much more capable leader in my legal services community. I learned through the Leadership Institute that leadership can be taught and that support and encouragement are essential to the development of new leaders.”
Astrid Lebron, Connecticut Legal Services

The Competency Framework and Curriculum Elements by Competency

In CLAE's courses, an effort is made to provide information and learning in the context of overarching frameworks, which make these complexities easier to remember and assimilate. The Leadership Institute curriculum is arranged in terms of seven essential competencies that leaders must possess. Curriculum elements under each competency are set out below.



Communicating Strategic Intent:

- A study of the values, vision and mission expressed by the conceptual founders and leaders of the legal aid movement
- Exercises designed to surface and explore Fellows' own legal aid visions and visions for their work and organizations
- Communications and media strategy and practice
- Messaging and framing as communication techniques
- Tools to assess audience receptiveness to message: focus groups and key informant interviews
- Exercises in crafting a compelling vision for the Fellow's leadership initiative

Self Awareness

- Mental models - Fellows explore how their preconceptions influence how they react to and are viewed by others
- Self assessment - Fellows complete an in-depth self assessment test focused on the leadership competencies at the beginning of the Institute and at the end
- 360 Feedback - Fellows develop assessment questions to be asked of a set of supervisors, peers, subordinates and non-work acquaintances and then explore the feedback they receive in facilitated sessions and private discussions
- Fellows complete True Colors, Enneagrams and other personality type assessment exercises

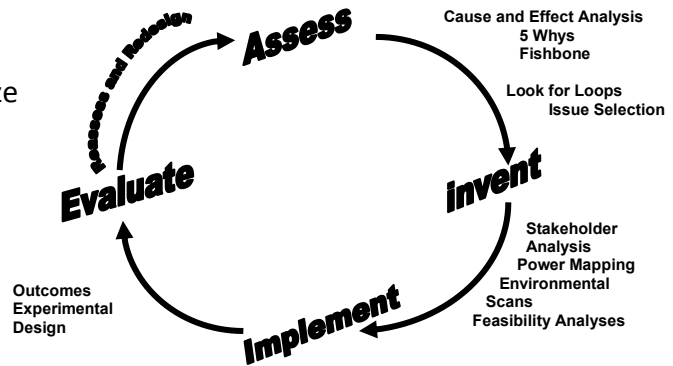
Achieving Workable Unity

- Identifying and using different levels of involvement in collaborative decision making, different decision making models and tools for choosing appropriate levels of involvement for stakeholders
- Meeting planning and facilitation skills
- Relationship building skills and techniques

- Planning and having difficult conversations constructively
- Tools for building shared meaning
- Explore issues of difference in groups and challenges associated with them and learn strategies to work effectively across difference
- Apply tools of cultural competence and cross-cultural communications

Systems and Strategic Thinking:

- Problem analysis, and methods to analyze cause and effect
- Links and Loops analysis of the dynamics of systems and the manner in which system choices influence other aspects of a system
- Feasibility Analysis Tools:
 - Stakeholder Analysis
 - Power Mapping
 - Environmental Scanning
- Issue and tactic selection strategies for advocacy campaigns



The dynamic components and life cycle of a project as shown in this graphic are studied. The Fellows consider and organize their own leadership initiatives within this life cycle framework

Delivering on Strategic Intent:

- Defining goals for projects and initiatives
- Project planning techniques and tools
- Project and team management and facilitation
- Resource assessment and budgeting
- Outcome measurement
- Evaluation



Developing New Leaders:

- Working with mentors and learning mentoring skills
- Fellows develop their own leadership development plans and learn how to use these plans to support the growth of others
- Recognize different learning styles and how issues of difference influence who we tend to identify as potential new leaders
- Feedback and critiquing skills

Fostering the Process of Renewal:

- Community Listening techniques for legal aid programs

What Does The Institute Looks Like on the Ground, and How Can We Do This In Our State or Region?

CLAE's Leadership Institute can be carried out in your state and modified to represent your thinking about essential leadership values, concepts and skills. Talk to us about designing a leadership development program that meets your needs.

The Institute design offered here takes place over a 15 month period. Our initial delivery involved 11 Fellows (Leaders-in-training). Each Fellow completes the curriculum, develops and follows a personal leadership development plan, and undertakes a leadership initiative: a project of interest to them and important to their program. Each Fellow is paired with a mentor from a different legal services program in their region, selected based on an awareness of the interests of the Fellow and the nature of their proposed leadership initiative. Mentors are selected to complement the Fellow and, where possible, to provide expertise that will be useful in connection with the Fellow's project. Pains are taken to see that both Fellow and mentor groups are diverse.

Fellows participate in four three-day Leadership Retreats, where each time they are joined for the last day/day and a half by mentors, who themselves benefit from separate one-to-two day retreats beforehand. For the mentors, these shorter retreats provide an ideal opportunity to receive training and peer support of their own, further enhancing their mentoring capabilities.

Each Fellow Retreat begins with a leadership story—a reflection by a noted legal services leader from within the host community or outside it—in which the well regarded leader describes their own notions of leadership and the experiences that led them to it. The story is followed by reflection among the Fellows as they begin to wrestle with their own leadership aspirations, beliefs and assumptions. From that point, each retreat includes a mix of presentations of key leadership concepts and tools, small group exercise and practice and focused work on their leadership initiatives and leadership development plans. Exercises and work on the initiatives is tied to the curriculum and presents an opportunity to work with the concepts learned in a real world situation. Fellows work together on each others' initiatives, learning from the richness of experiences as they take on similar but different challenges and support each other in the effort.

Between retreats, Fellows remain engaged through work on their initiatives, regular meetings and phone conversations with their mentors, online learning activities that build on the curriculum from the previous retreat, or webinars in which the Fellows come together to discuss their progress and provide mutual support. In our evaluations of the first Institute, the development of this community of like-minded emerging leaders, sharing the same challenges, learning the same tools, and often facing the same obstacles in their programs, was one of the most profound positives of the Institute experience. Fellows universally felt their growth as leaders was fundamentally enhanced by the long term relationship with the other Fellows as the Institute progressed.

Leadership Institute Vision

The Leadership Institute promotes leadership effectiveness grounded in core legal aid values and mission. The Institute is designed to further a powerful vision of the future state of our legal services community:

- There is a growing community of leaders in a broad array of roles who speak a common language about how to envision, plan, and carry out their work;
- Leadership is intentionally and consistently more diverse, and there is a vibrant sharing of ideas and authority among leaders of different generations and backgrounds;
- Legal aid organizations participate in a constant and vital re-imagining of their roles as agents of social change, a process that is rooted in and inclusive of community interests and that builds upon community strengths;
- Leaders increasingly mirror the diversity of the communities we serve;
- Legal aid programs are vibrant and exciting workplaces where the ideas and talents of all advocates are respected and developed;
- Leadership within our community is participatory, inclusive and facilitative;
- Leadership is credible and accountable.

What Do Participants Say The Institute Has Done for Them and Their Programs?

- 10 of 11 in our inaugural class reported that participation had increased their self confidence
- 10 of 11 reported an increase in their sense of their own power within their organizations, and ability to influence fundamental decisions of the organization
- 10 of 11 consider themselves more capable of playing a leadership role within their organization
- 100% reported a greater tolerance for diversity and for divergent views and styles than they had before their participation
- 100% reported having better networks and increased support for their work as a result of their participation in the Institute
- 9 of 11 reporting taking on higher impact organizational, management or advocacy efforts within their program since joining the Institute
- More than half reported taking on greater mentoring, advocacy leadership or supervisory responsibilities

At a Glance

Time Frame:

12 - 15 month multi-component program including three to four in-person multi-day retreats, one to one mentoring relationships, creation and undertaking of a leadership initiative and leadership development plan, and online activities and curriculum between each in-person retreat

Skills and Concepts Explored:

The extensive curriculum is organized under a set of seven competencies that every leader needs in order to be successful. Under each, the curriculum includes both conceptual explorations of the competencies and the practical skills and tools associated with it. The core competencies are:

- Communicating Strategic Intent
- Self Awareness
- Systems Thinking
- Achieving Workable Unity
- Delivering on Strategic Intent
- Developing New Leaders
- Fostering the Process of Renewal

The Institute's fundamental focus is on the concept of "facilitative leadership" and the development of leaders who contribute to and nurture the growth of others.

Learning and Production Materials and Media Resources Used:

Participants use a wide variety of resources including video best practice demonstrations of critique and feedback, difficult conversations and media and communications strategies, web based curriculum and exercises between retreats, webinars, online survey technology to secure self awareness information from others, wikis and online discussions to work together on joint projects and initiatives.

ABA Civil Legal Aid Practice Standards addressed:

2.1: Identifying legal needs and planning to respond; **2.4:** Cultural Competence; **2.5:** Staff Diversity; **2.6:** Achieving lasting results for low-income individuals and communities