

Using Leader Stories to Build Shared Vision and Commitment



Georgia Leadership Institute
for School Improvement

**A Performance-based Learning Module
for Georgia's Educational Leaders**

Related Modules

Related GLISI Modules

Other modules related to this topic include:

- *Writing With Impact for Effective Communication*
 - *Leading a Team to Present the State of the School*
 - *Balanced Performance Improvement Series: Leading a Team to Develop Performance Foundations*
 - *Balanced Performance Improvement Series: Developing a Performance Leadership Handbook*
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Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"> • The need to: • Engage and influence an audience • Communicate your vision regarding the improvement needs for a school or district • Communicate the reasons why you are taking the actions and making the decisions you are • Personal, professional and school/district artifacts • Materials for writing stories (paper and pen/pencil, or computer with word processing and presentation software) • A group of stakeholders from your organization • Materials for sharing with a group (flip chart and markers, paper and pens/pencils, laptop and projector, etc.) 	<ul style="list-style-type: none"> • Create the Leader Stories... <ul style="list-style-type: none"> ○ Who I Am Story ○ Who We Are Story ○ Future Story • ...and Share them with a stakeholder group from your organization 	<ul style="list-style-type: none"> • The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment • GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment

Module Introduction

Acknowledgement The content in this module is based on and adapted from the work of Noel M. Tichy, specifically Chapter 4 in the book [The Leadership Engine: How Winning Companies Build Leaders at Every Level](#) (1997, HarperCollins, with Eli Cohen). You should read [The Leadership Engine](#) (as well as other selections from this module's Recommended Resources page) in order to gain a thorough understanding of all the concepts and lessons learned related to this topic.

This module *complements these books*, which provide excellent conceptual information, *by providing step-by-step instructions* that will help you with the task of implementing this idea in your school/district.

Using Leader Stories to Build Shared Vision and Commitment

As the leader of a school or district, one of your most important responsibilities is to influence and engage audiences that need to embrace and participate in the improvement strategies you've identified for your school(s). One of the most effective strategies leaders employ to successfully influence various audiences is to develop and tell a series of "leader stories."

In this module, you will learn how to develop and tell the following leader stories:

- The Who I Am Story
- The Who We Are Story
- The Future Story

As you share stories with audiences in your school, you will have an opportunity to invite them to contribute to and refine your Who We Are and Future Story. These stories reflect the nature of your organization and your vision about what it will look like sometime in the future once you've implemented your improvement strategies.

Sample Stories

As you complete this module, please refer to the sample stories in the appendices:

- Appendix A: Sample Who I Am Story
- Appendix D: Sample Who We Are Story
- Appendix C: Sample Future Story

If you'd like to read additional examples written and told by well-known corporate executives, refer to Chapter 4 in the book [The Leadership Engine](#) by Noel M. Tichy.

What Is the Leader's Role?

Your role as the leader is to develop your personal Who I Am, Who We Are and Future Stories and then to communicate them to various audiences.

You must be able to easily adapt the stories to fit a variety of audiences – eliminating unnecessary details for some audiences, while adding or changing information/data, examples, and graphics for other audiences.

You must also lead a team to review the initial drafts of your Who We Are and Future Stories and provide recommendations for changes, so that those stories will accurately represent your team's view as well as your own.

Begin With The End in Mind

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
 - Understand the standards (performance criteria) by which your performance will be assessed
 - Gauge your current level of performance against what will be expected of you by the end of the module
 - Prioritize which areas to concentrate on as you work through the module
-

Topic 1: Creating Your Who I Am Story

Creating Your Who I Am Story

Creating your Who I Am Story is your opportunity to give the people you lead insight into who you are, your beliefs, the experiences you've had, and the people that have impacted you. Your Who I Am Story reflects your beliefs about how you plan to lead your school or district to greatness in the face of challenges.

Why Create Your Who I Am Story?

Creating and communicating a historical account of who you are is the first step to formulating a picture about your leadership style. The picture you create should reflect how the personal experiences you've had, and the people you've encountered, have shaped your beliefs about dealing with problems and improving your school's performance. Like each of the stories you will create in this module, your Who I Am Story should impact people on an emotional level. This story is important because it shows people the lessons you've learned, the actions you should have taken (and have learned to take in the future), and how you grew from experience. Communicating your Who I Am Story to the people you lead is a great way to teach other people the lessons you have learned. As a result, they learn how to solve problems or avoid making the same mistakes that you made, and to lead others to do the same.

Identifying Your Audience

Over time, you will probably share your Who I Am Story with a wide variety of audiences, including the following:

- Faculty and staff at your school
- Students
- Parents
- PTA and other school-related organizations
- The general public in your community and beyond
- The Chamber of Commerce and other community organizations
- Colleagues across your district and beyond
- Your Board of Education
- The media

Ultimately, your goal is to create a Who I Am Story that can be used with a variety of audiences, perhaps with a few tweaks and customizations as necessary. The first step is to write a general draft, and a good way to get started is to write it for the audience of the faculty and staff at your school.

Tip(s)

- Remember, you're going to be telling your Who I Am Story to various audiences, so think about a way to engage your audience and make them pay attention. For example, you might want to start with a startling statistic or fact, current event, or personal story.
 - You may find it helpful to look back at photos, letters, recognitions, and other artifacts, both personal and professional. These can jog your memory about the goals you've achieved, the people and situations you've impacted, and the people and experiences who have impacted you.
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Identify your audience	<p>If you are writing your Who I Am Story for the first time, assume that you are writing it for the audience of the faculty and staff at your school (or your team at Central Office).</p> <p>If you are customizing a previously-written Who I Am Story for a particular communication opportunity, consider the specific needs, interests and characteristics of the audience at hand, and make adjustments accordingly.</p>
2. Gather artifacts	<p>Gather artifacts from your personal and professional life – such as photos, letters, notes, certificates of achievement or recognition, or rewards recognizing you for your work and success. Lay them out in front of you.</p>
3. Brainstorm	<p>Brainstorm and jot down anything that comes to mind related to the following four points:</p> <ol style="list-style-type: none"> 1. Lessons learned in childhood, school, formal education, past and recent work and personal experience 2. How the lessons learned have shaped your beliefs 3. The people who have had an impact on your life and your leadership style 4. Your resulting beliefs about how the school can transform from its current “As Is” state to a future “To Be” state with a “Better-Seeking” culture <p>Keep the rules of brainstorming in mind. Even though you are brainstorming on your own, it is important at this stage to:</p> <ul style="list-style-type: none"> • Jot down everything that comes to mind related to the four points • Not be too critical or self-edit your thoughts (that will come later) • List everything that you can remember that has shaped your belief system. Include the experiences you had in your school, work, and personal situations, as well as the people who impacted you (good or bad) – everything that contributes to how you plan to lead others in school improvement efforts.
4. Create a story outline	<p>Outline the points of your story in a logical manner. Decide how you are going to introduce and explain the reason you are telling your story.</p>
5. Draft your Who I Am Story	<p>Draft your story based on your outline. Your story should take no more than three minutes to tell. (Typically, a three minute story is about two pages of typed, single-spaced text, in Times New Roman 12 point font.)</p> <p><i>NOTE: You may prefer to compose your story on computer so that you can easily add, delete and change text. Or, you may find it easier to draft it on paper first and then type it in to the computer. The method is not important, it's just important to get your first draft recorded.</i></p>

Topic 1: Creating Your Who I Am Story
Using Leader Stories to Build Shared Vision and Commitment

Step	Action						
6. Review and Revise your story	<p>As you would do with any written work, review it for:</p> <ul style="list-style-type: none"> • Spelling, grammatical errors, and typos • Redundant and verbose language • Unexplained jargon and terms • Illogical sequencing of information, facts or figures • Tone that is either too formal or informal for the intended audience <p>Revise your story as needed.</p>						
7. Share your story and gain feedback	<p>Share your story with someone who knows you and who will be honest in giving you feedback (a “safe” person). Ask what changes they recommend. If you agree with their feedback, revise your story accordingly.</p>						
8. Time the story	<p>Time your story as you read it out loud to yourself or to someone else with whom you feel comfortable.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">IF...</th> <th style="text-align: center;">...Then</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">It takes more than 3 minutes to deliver</td> <td style="padding: 5px;">Review your story to see where verbiage can be cut or edited to be more concise. Make changes as necessary.</td> </tr> <tr> <td style="padding: 5px;">The story is delivered in 3 minutes or less</td> <td style="padding: 5px;">Congratulations! Your story meets the time criteria.</td> </tr> </tbody> </table>	IF...	...Then	It takes more than 3 minutes to deliver	Review your story to see where verbiage can be cut or edited to be more concise. Make changes as necessary.	The story is delivered in 3 minutes or less	Congratulations! Your story meets the time criteria.
IF...	...Then						
It takes more than 3 minutes to deliver	Review your story to see where verbiage can be cut or edited to be more concise. Make changes as necessary.						
The story is delivered in 3 minutes or less	Congratulations! Your story meets the time criteria.						

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

You are the recently appointed leader of your school. You'll be working with a team of "Better-Seekers" (your colleagues, a member of the PTA, a community partner, and a few members of your staff). It's your responsibility to initiate improvement efforts for your school. Some members of the Better-Seeking Team are familiar with your leadership style and your past work experiences, but none are complete knowledgeable about how you got to where you are now, your beliefs about how the culture of the school needs to change, how past experiences and people have shaped your beliefs, and your overall philosophy about leading people to drive change and improve the school's performance. This is your opportunity to set the stage and communicate your Who I Am Story...but first, you must create your story in written format.

Practice Worksheet

Identify the audience for whom you are writing this draft of your Who I Am Story.

Gather personal artifacts (letters, pictures, notes, certificates of achievement, etc.) to help you focus on your past work achievements for your work and success. List the items you reviewed below:

Brainstorm #1: What lessons have you learned from your childhood, formal education, past and recent work experience, and personal experiences?

Brainstorm #2: How have your lessons learned shaped your current beliefs and your leadership style? What problems did you encounter that impact the way you lead and the way you'd like others to act and lead?

Practice Worksheet

Brainstorm #3: Who are the people who have had an impact on your life and your leadership style? What individuals have you encountered, in both personal and professional situations, that have caused you to think differently about how to lead others in solving problems and achieving results?

Brainstorm #4: As a result of the previous reflections, what are your beliefs about how your school/district can transform from its current state to the desired “to be” state of “Better-Seekers”?

Create an Outline of your Who I Am Story, weaving the points together in a logical manner. Identify how you are going to introduce your story and explain your reason for telling it.

Practice Worksheet

Draft your Who I Am Story. (If you prefer, you may draft it on the computer and attach a copy).

Practice Worksheet

Review and revise your story using the Document Review Checklist below, and make changes as needed.

- Spelling and grammatical errors and typos
- Redundant or verbose language
- Unexplained jargon or terms
- Illogical sequencing of information, facts or figures
- Tone that is either too formal or informal for the intended audience
- Any other problems identified? Describe:

Ask someone to listen to your story. Read your story out loud, gain feedback, and make changes as necessary. (This person may also help you time your story).

Name of individual who listened to your story: _____

Feedback received:

If you chose not to incorporate any of the feedback, describe why:

Practice Worksheet

Confirm whether your story meets the 3-minute criteria, and make changes as necessary.

Was your story delivered in 3 minutes or less?

Yes

No

Topic Practice Performance Checklist

Select one: Performer’s self-assessment Performance Coach’s observations

Performer’s Name: _____

Performance Coach’s Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The Who I Am Story is created	<input type="checkbox"/> Audience is identified	<input type="checkbox"/> Yes
	<input type="checkbox"/> Artifacts are gathered	<input type="checkbox"/> No
	<input type="checkbox"/> Brainstorming is used to generate ideas	
	<input type="checkbox"/> Lessons learned and work background are described	
	<input type="checkbox"/> The leader defines how the lessons learned have shaped his/her beliefs	
	<input type="checkbox"/> People and situations that have impacted the leader and his/her style are described	
	<input type="checkbox"/> Resulting beliefs about how the school can transform from the “As Is” to the “To Be” state is described	
	<input type="checkbox"/> An outline of the story is written	
	<input type="checkbox"/> A draft of the story is written	

Topic 1: Creating Your Who I Am Story
Using Leader Stories to Build Shared Vision and Commitment

Evidence	Criteria	Proficient? Give Feedback.
2. The story is reviewed by the author and revised accordingly	<input type="checkbox"/> Spelling, grammatical errors, and typos are corrected <input type="checkbox"/> Redundant or verbose language is eliminated <input type="checkbox"/> Unexplained jargon or terms are eliminated <input type="checkbox"/> Illogical sequencing of information, facts or figures is corrected <input type="checkbox"/> Tone (and/or visuals) is (are) neither too formal nor too informal for the intended audience is corrected	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The story is reviewed with a “safe” person	<input type="checkbox"/> The story is reviewed by a “safe” person (friend or colleague) <input type="checkbox"/> The story is read out loud to the reviewer (the written story may also be shared) <input type="checkbox"/> Suggestions from the “safe” person are noted <input type="checkbox"/> Appropriate changes are made based on the feedback provided	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. The story meets the time criteria	<input type="checkbox"/> The Who I Am Story can be delivered in three minutes or less	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Creating Your Who We Are Story

Creating Your Who We Are Story

In creating your Who I Am Story, you created a personal account of your past experiences, challenges faced and lessons learned, and people that have impacted your beliefs and leadership style. You did this to communicate how past experiences and interactions with people have shaped your beliefs about how to lead the organization to success.

The Who We Are Story is similar, but instead of telling a story about personal experiences and how you plan to lead the organization, the Who We Are Story is about the beliefs that your team and other stakeholders share. It tells how the organization as a whole will drive change and lead the school in an improvement effort. This story also provides its audience with an understanding of the demographics, working conditions, and culture under which the organization operates.

Why Create a Who We Are Story?

Creating your Who We Are Story is one of the essential steps a leader must take to foster teamwork in an organization and to motivate individuals to work together toward common goals.

What Makes a Good Who We Are Story?

The Who We Are Story should take no more than three minutes to relate the:

- School demographics, socioeconomic status, improvement needs, and the current culture of the organization
 - Team's shared experiences, attitudes and beliefs as a culture of "Better-Seekers"
 - Plan for how you (the leader) and your team will work together to achieve results
-

Option: Using Visuals to Enhance Your Who We Are Story

An effective way of depicting the Who We Are Story is by using graphics to illustrate the school demographics, socioeconomic status of the student population, improvement needs, and the current culture of the organization.

Leaders who are most effective in depicting their Who We Are Story with visuals create PowerPoint presentations and include pictures to illustrate what they want to relate. In addition to photos and clip art, pictures can take the form of animated graphics, charts, and facts. Leaders sometimes like to use pictures, as a bridge, to illustrate the current state and what it will take to move to the “To Be” state. Leaders also commonly use graphs and charts to describe the demographics of the school’s student population. Leaders have used simple clipart to illustrate a team’s shared experiences, attitudes and beliefs about the school’s culture.

Tip(s)

- In some cases, leaders have completely replaced words with graphics. Pictures often say what words don’t, so don’t feel that you have to combine words and text together in all cases. The point is to illustrate your message as clearly and concisely as possible.
 - It’s not about how attractive a visual is, but how well the visual relates the point or message that the leader is trying to convey.
 - Be careful not to overuse graphics, such as by using them on every slide of your presentation.
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Identify your audience	<p>If you are writing your Who We Are Story for the first time, assume that you are writing it for the audience of the faculty and staff at your school (or your team at the Central Office).</p> <p>If you are customizing a previously-written Who We Are Story for a particular communication opportunity, consider the specific needs, interests and characteristics of the audience at hand, and make adjustments accordingly.</p>
2. Gather materials and resources	<p>Gather any data, charts, or graphs you have that depict the student population, socioeconomic status, improvement needs, and current culture of the organization.</p> <p>Ask colleagues what they would share about the school, its culture, and improvement opportunities identified. Make notes about points you'd like to include.</p>
3. Brainstorm	<p>Jot down information you'd like to share to various audiences related to the following three points:</p> <ol style="list-style-type: none"> 1. School demographics, socioeconomic status, improvement needs, and the current culture of the organization 2. Team's shared experiences, attitudes, and beliefs as a culture of "Better-Seekers" 3. Plan for how the leader and his or her team will achieve results as a culture of "Better-Seekers" <p>Keep the rules of brainstorming in mind. Even though you are brainstorming on your own, it is important at this stage to:</p> <ul style="list-style-type: none"> • Jot down everything that comes to mind related to the four points • Not be too critical or self-edit your thoughts (that will come later)
4. Create a story outline	<p>Outline the points of your story in a logical manner. Like the Who I Am Story, you can begin with a startling fact or statistic, story or current event.</p>
5. Draft your Who We Are story	<p>Draft your story based on your outline. Your story should take no more than three minutes to tell. (Typically, a three minute story is about two pages of typed, single-spaced text, in Times New Roman 12 font.)</p> <p><i>NOTE: You may prefer to compose your story on computer so that you can easily add, delete, and change text. Or you may find it easier to draft it on paper first and then type it in the computer. The method is not important, it's just important to get it recorded.</i></p>

Topic 2: Creating Your Who We Are Story
Using Leader Stories to Build Shared Vision and Commitment

Step	Action	
6. Add visuals (optional)	If you wish to use visuals to support your story, use PowerPoint or similar presentation software to draft your story. Incorporate photos, clipart, graphs, tables, and the like to help convey your message.	
7. Review and revise your story	Review your Who We Are Story for: <ul style="list-style-type: none"> • Spelling and grammatical errors and typos • Redundant or verbose language • Unexplained jargon or terms • Illogical sequencing of information, facts or figures • Tone (and/or visuals) that is (are) either too formal or informal for the intended audience • Visuals are relevant, and convey the point(s) being made in a clear and concise manner • Visuals are not overused (on every slide) Make any necessary changes.	
8. Share your story and gain feedback	Share your story with someone who knows you and who will be honest giving you feedback (a “safe” person). Ask what changes they recommend. If you agree with their feedback, revise your story accordingly.	
9. Time the story	Time the story as you read it out loud to yourself or to someone else with whom you feel comfortable.	
	IF...	...Then
	It takes more than 3 minutes to deliver	Review your story to see where verbiage can be cut or edited to be more concise. Make changes as necessary.
	The story is delivered in 3 minutes or less	Congratulations! Your story meets the time criteria.

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Create a Who We Are Story based on the same scenario you used in Topic 1.

Practice Worksheet

Identify the audience for whom you are writing this draft of your Who We Are Story.

Gather materials and resources (data, charts, or graphs) that depict the student demographics, socioeconomic status, improvement needs and current culture of the organization. Ask a few colleagues what they would share about the school, its culture & improvement opportunities identified. List the items you reviewed below.

Brainstorm #1: What information do you want to share regarding school demographics, socioeconomic status, improvement needs and the current culture of the organization?

Brainstorm #2: What are some examples of your team's shared experiences, attitudes and beliefs as a culture of "Better-Seekers"?

Practice Worksheet

Brainstorm #3: How are you going to illustrate your plan for how you and your team will achieve results as a culture of “Better-Seekers”?

Create an Outline of your Who We Are Story, weaving the points together in a logical manner. Begin with a startling fact or statistic, story or current event.

Practice Worksheet

Draft your Who We Are Story. (If you prefer, draft it on computer and attach a copy.)

Practice Worksheet

Review and revise your story using the Document Review Checklist below, and make changes as needed.

- Spelling and grammatical errors and typos
- Redundant or verbose language
- Unexplained jargon or terms
- Illogical sequencing of information, facts or figures
- Tone (and/or visual) that is either too formal or informal for the intended audience
- Visuals used are relevant to the story theme, and convey the points being made in a clear and concise manner
- Visuals used are appropriate for the intended audience
- Visuals are not overused (on every slide)
- Any other problems identified? Describe:

Ask someone to listen to your story. Read your story out loud, gain feedback, and make changes as necessary. (This person may also help you time your story).

Name of individual who listened to your story: _____

Feedback received:

If you chose not to incorporate any of the feedback, describe why:

Practice Worksheet

Confirm whether your story meets the 3-minute criteria, and make changes as necessary.

Was your story delivered in 3 minutes or less?

Yes

No

Topic Practice Performance Checklist

Select one: Performer’s self-assessment Performance Coach’s observations

Performer’s Name: _____

Performance Coach’s Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The Who We Are Story is created and communicated	<input type="checkbox"/> Audience is identified	<input type="checkbox"/> Yes
	<input type="checkbox"/> Artifacts are gathered	<input type="checkbox"/> No
	<input type="checkbox"/> The following are described:	
	<input type="checkbox"/> School demographics	
	<input type="checkbox"/> Socioeconomic status	
	<input type="checkbox"/> Improvement needs	
	<input type="checkbox"/> Current school culture	
	<input type="checkbox"/> Team’s shared experiences, attitudes and beliefs as a culture of “Better-Seekers” are described	
	<input type="checkbox"/> The improvement strategies the leader plans to initiate to achieve a culture of “Better-Seekers” is described	
	<input type="checkbox"/> An outline of the story is written	
	<input type="checkbox"/> A draft of the story is written	
	<input type="checkbox"/> OPTIONAL: Accompanying visuals such as PowerPoint (data, graphs, charts, photos, clipart) are used to illustrate the story	

Topic 2: Creating Your Who We Are Story
Using Leader Stories to Build Shared Vision and Commitment

Evidence	Criteria	Proficient? Give Feedback.
2. The story is reviewed by the author and updated accordingly	<input type="checkbox"/> Spelling, grammatical errors, and typos are corrected <input type="checkbox"/> Redundant or verbose language is eliminated <input type="checkbox"/> Unexplained jargon or terms are eliminated <input type="checkbox"/> Illogical sequencing of information, facts or figures is corrected <input type="checkbox"/> Tone (and/or visuals) is (are) neither too formal nor too informal for the intended audience is corrected <input type="checkbox"/> Visuals are relevant and convey the points in a clear and concise manner <input type="checkbox"/> Visuals are not overused (on every slide)	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The story is reviewed with a "safe" person	<input type="checkbox"/> The story is reviewed by a "safe" person (friend or colleague) <input type="checkbox"/> The story is read out loud to the reviewer (the written story may also be shared) <input type="checkbox"/> Suggestions from the "safe" person are noted <input type="checkbox"/> Appropriate changes are made based on the feedback provided	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. The story meets the time criteria	<input type="checkbox"/> The Who We Are Story can be delivered in three minutes or less	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 3: Creating Your Future Story

Creating Your Future Story

The Future Story you create should be a fictional, fantasy-like account depicting where you'd like to see your school/district – and what you'd like to hear others saying about it – when the “To Be” state is achieved.

Why is Creating Your Future Story Important?

People often resist change because it is a difficult transformation. One of the best ways to motivate them to step into the unknown territory is through their imaginations. Tell a story, like you would tell a child. It should illustrate how the school will look and perform some years into the future. It is another tool that successful leaders use to motivate people to drive change, and to ensure that the vision is carried out through concrete actions.

What a Future Story IS...

Developing your Future Story is a creative writing exercise. In creating your Future Story you will need to think about a story line that conveys the current culture of the school, and how the school must change to be perceived as a culture of “Better Seekers.” As the leader, you should portray yourself and the people who work for you as the protagonists of the story, who must face obstacles presented on the path to success and who must learn how to overcome them at every step of the way. You need to write a story that helps the people you lead see the fantasy and the future “To Be” state.

For example, you may talk about how three school districts worked together to become a technology hub and what that looked like and how it benefited students. You may describe how gaps will be closed between African-Americans and Whites, or between English- and Spanish-speaking students. The story can illustrate how people will interact with each other when that happens. For maximum impact, you can include graphic images or metaphors to support your message.

**...And What a
Future Story Is
NOT**

Your Future Story is not the time to explain your Five-Year Strategic Plan, complete with all the details about how you plan to get your school from the current state to the desired state.

The goal of the Future Story is to excite your audience and to motivate them to “get on board” for the journey to the desired state. Because the road from here to there will not always be easy, your Future Story should provide a compelling reason for agreeing to the journey – and for sticking to it over time. Facts, figures, details and timelines are rarely such motivating forces!

Tip(s)

Think of yourself and your staff as time travelers who have jumped ahead in time about five years. Or, pretend that you are writing (or reading) a newspaper, journal or magazine article in the future. Ask yourself these questions:

- What is the school culture like?
- What school improvements have been made
- How are teachers teaching?
- What are students learning? What questions are they asking?
- What skills and knowledge are they yearning for? How will the students be performing?
- What positive things are people saying about the school (teachers, staff, parents, community, media, etc.)?
- What changes will have come about?

Paint the picture that you see after all the strategies have been implemented and success has been achieved. (Remember, the strategies are not the story – the resulting successful state is the story.)

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

Step	Action
1. Identify your audience	<p>If you are writing your Future Story for the first time, assume that you are writing it for the audience of the faculty and staff at your school (or your team at the Central Office).</p> <p>If you are customizing a previously-written Future Story for a particular communication opportunity, consider the specific needs, interests and characteristics of the audience at hand, and make adjustments accordingly.</p>
2. Gather materials and resources	<p>If necessary, grab a favorite children’s book that tells the type of story that you’d like to tell. Read it and think about how you can tell a similar story to convey your message. Think about how this story relates to your Who I Am and Who We Are stories. Alternatively, review a magazine or book to consider telling your story using a journalistic style.</p>
3. Identify the storyline or plot	<p>Make notes about the storyline or plot you’d like to use.</p> <p>Portray yourself and the people you lead as the protagonists and heroes of the story.</p> <p>Answer the questions: What are the challenges you and your team will face along the way? How will you overcome them? What victories will you celebrate?</p>
4. Include examples	<p>Illustrate for your audience:</p> <ul style="list-style-type: none"> • What is your vision of the school or district’s “To Be” state is depicted in a story in a fictional/fantasy account? • What are the challenges/obstacles that you, your staff, and other stakeholders will face along the school improvement path are depicted? • What are examples of how other schools and districts succeeded in their improvement mission and achieved their desired “To Be” state? • What does you and your staff, and other stakeholders’ victories look like? <p>Example illustrations might answer such questions as:</p> <ul style="list-style-type: none"> • What are the teachers teaching? • What are the students learning? What questions are they asking? • What skills and knowledge are they yearning for? How will they be performing? • What positive things are people saying about the school? (Teachers, staff, parents, community partners, media, etc.) • How would the changes come about? <p>Share examples of how other schools succeeded in their improvement mission.</p>

Topic 3: Creating Your Future Story
Using Leader Stories to Build Shared Vision and Commitment

Step	Action
5. Create a story outline	Unlike the Who I Am and Who We Are Stories, the Future Story is a fictional account and needs to be organized in a logical manner, but does not need to unfold in a sequential manner. You could start your story at the end when the fantasy has come true and work backwards towards the beginning. Think through and jot down some notes about how you'd like to tell your story.
6. Draft your Future Story	Draft your story based on your notes. Your story should take no more than three minutes to tell. (Typically, a three minute story is about two pages of typed, single-spaced text, in Times New Roman 12 font.) <i>NOTE: You may prefer to compose your story on computer so that you can easily add, delete, and change text. Or you may find it easier to draft it on paper first and then type it in the computer. The method is not important, it's just important to get it recorded.</i>
7. Review and revise your story	Review your Future Story for: <ul style="list-style-type: none"> • Spelling and grammatical errors and typos • Redundant or verbose language • Unexplained jargon or terms • Illogical sequencing of information, facts or figures • Tone that is either too formal or informal for the intended audience • Visuals used are relevant to the story theme • Visuals used are appropriate for the intended audience Also, check for the following: <ul style="list-style-type: none"> • Be sure that it is a story and is not an explanation or walkthrough of your five-year strategic plan. • Is the story clear and consistent with my vision? • Does the story touch people emotionally, and excite them? • Does your story motivate people to drive change and ensure that the vision is carried out through concrete actions? Revise your story as needed.
8. Share your story and gain feedback	Share your story with someone who knows you and who will be honest giving you feedback (a "safe" person). Ask what changes they recommend. If you agree with their feedback, revise your story accordingly.

Topic 3: Creating Your Future Story
Using Leader Stories to Build Shared Vision and Commitment

Step	Action	
9. Time the story by reading out loud	Time the story as you read it out loud to yourself or to someone else with whom you feel comfortable.	
	IF...	...Then
	It takes more than 3 minutes to deliver	Review your story to see where verbiage can be cut or edited to be more concise. Make changes as necessary.
	The story is delivered in 3 minutes or less	Congratulations! Your story meets the time criteria.

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Draft your Future Story using the same scenario as you used in Topics 1 and 2.

Practice Worksheet

Identify the audience for whom you are writing this draft of your Future Story.

Gather materials and resources. Use them to help you think about how you can tell a similar story to convey your message (i.e. favorite children's book, or a newspaper article). Use the space below to jot down some of your initial ideas you gain through reviewing these resources.

Identify the storyline or plot, making notes on what you would like to use.

Answer these questions: What do the protagonists and heroes in the story do to achieve results? What are the challenges you and your team will face along the way? How will you overcome them? What victories will you celebrate?

Practice Worksheet

Include examples that illustrate your theme. Paint a picture (in words or visuals) for your audience incorporating the elements below.

What is your vision of the school or district's "To Be" state as depicted in a story/fictional/fantasy account?

What are the challenges/obstacles that you, your staff, and other stakeholders will face along the school improvement path are depicted?

What are examples of how other schools and districts succeeded in their improvement mission and achieved their desired "To Be" state?

What do you, your staff, and other stakeholders' victories look like? (I.e. What are teachers teaching? What are students learning? How will they be performing? What positive things will people be saying?)

Practice Worksheet

Create an Outline of your Future Story, weaving the points together in a logical manner. Keep in mind it is a fictional account and needs to make sense. Start the story at end when the fantasy has come true and work backwards towards the beginning. Jot down some notes about how you'd like to tell your story.

Practice Worksheet

Draft your Future Story. (If you prefer, draft it on computer and attach a copy.)

Practice Worksheet

Review and revise your story using the Document Review Checklist below, and make changes as needed.

- Spelling and grammatical errors and typos
- Redundant or verbose language
- Unexplained jargon or terms
- Illogical sequencing of information, facts or figures
- Tone that is either too formal or informal for the intended audience
- Visuals used are relevant to the story theme
- Visuals used are appropriate for the intended audience
- Any other problems identified? Describe:

Review and revise your story according to these criterion, and make changes as needed:

- It is a story and is not an explanation of your five-year strategic plan.
- Is the story clear and consistent with my vision?
- Does the story touch people emotionally, and excite them?
- Does your story motivate people to drive change and ensure that the vision is carried out through concrete actions?

Practice Worksheet

Ask someone to listen to your story. Read your story out loud, gain feedback, and make changes as necessary. (This person may also help you time your story).

Name of individual who listened to your story: _____

Feedback received:

If you chose not to incorporate any of the feedback, describe why:

Confirm whether your story meets the 3-minute criteria, and make changes as necessary.

Was your story delivered in 3 minutes or less?

- Yes
- No

Topic Practice Performance Checklist

Select one: Performer’s self-assessment Performance Coach’s observations

Performer’s Name: _____

Performance Coach’s Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The Future Story is created and communicated	<input type="checkbox"/> Audience is identified	<input type="checkbox"/> Yes
	<input type="checkbox"/> Materials and resources are gathered	<input type="checkbox"/> No
	<input type="checkbox"/> The leaders/staff are portrayed as the protagonist(s) of the story	
	<input type="checkbox"/> The leader’s vision of the school/district’s “To Be” state is depicted in a story/fictional/fantasy account	
	<input type="checkbox"/> The challenges/obstacles that the leader, staff and other stakeholders will face along the school improvement staff are depicted	
	<input type="checkbox"/> Examples of how other schools and districts succeeded in their improvement mission and achieved their desired “To Be” state are described The story illustrates what the leader’s, staff’s, and other stakeholders’ victories look like	
	<input type="checkbox"/> An outline of the story is written	
	<input type="checkbox"/> A draft of the story is written	
	<input type="checkbox"/> The story motivates people to drive change	
	<input type="checkbox"/> OPTIONAL: visuals are used to illustrate the story	

Topic 3: Creating Your Future Story
Using Leader Stories to Build Shared Vision and Commitment

Evidence	Criteria	Proficient? Give Feedback.
2. The story is reviewed by the author for technical issues, and updated accordingly	<input type="checkbox"/> Spelling, grammatical errors and typos are corrected <input type="checkbox"/> Redundant or verbose language is removed <input type="checkbox"/> Unexplained jargon or terms are removed <input type="checkbox"/> Illogical sequencing of information, facts or figures is corrected <input type="checkbox"/> Tone (and/or visuals) is (are) neither too formal nor too informal for the intended audience <input type="checkbox"/> Visuals used are relevant to the story theme, and convey the points being made in a clear and concise manner <input type="checkbox"/> Visuals are not overused (every slide)	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The story is reviewed by the author for content and effectiveness, and is updated accordingly	<input type="checkbox"/> The Future Story is written as a fictional account <input type="checkbox"/> The Future Story is NOT an explanation of the leader's five-year strategic plan (or other specific action plan details) <input type="checkbox"/> The storyline or plot conveyed is clear, concise, and consistent with the leader's vision <input type="checkbox"/> The story touches people emotionally and excites them <input type="checkbox"/> The story motivates people to drive change	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 3: Creating Your Future Story
Using Leader Stories to Build Shared Vision and Commitment

Evidence	Criteria	Proficient? Give Feedback.
4. The story is reviewed with a “safe” person	<input type="checkbox"/> The story is read out loud to the reviewer (written story may also be shared) <input type="checkbox"/> The story is reviewed by a “safe” person (friend, colleague) <input type="checkbox"/> Suggestions from the “safe” person are noted <input type="checkbox"/> Appropriate changes are made based on feedback provided	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. The story meets the time criteria	<input type="checkbox"/> The Future Story can be delivered in three minutes or less	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 4: Sharing Your Leader Stories

Sharing Your Leader Stories

The final step in creating leader stories is...sharing them!

Over time, you will share your leader stories with a variety of audiences in order to communicate your values, vision, intentions, and promises.

Get started by sharing them with a few “safe” audiences – first a group of “friendly” peers (in the Final Practice) and then a group of your real-life work associates (in the Final Assessment) – in order to get feedback that will help you finalize them before you share them with everyone.

When Do I Begin This Task? (Cues)

The Who I Am Story is a personal account of your past work and life experiences, the people who have impacted your beliefs, and how you plan to lead your school. Therefore you can ask colleagues and audiences to review this story for technical errors and general tone, but they will probably not be able to provide significant feedback related to your content specifics.

When you share your Who We Are Story and your Future Story, however, many people may be able to provide valuable input that enhances your stories – especially those who work with you on a daily basis. Because the stories are intended to reflect them, too, their input and buy-in is vital. You will be well served to ask them to contribute to the accuracy and vision of the stories, as well as for their general feedback.

Tip(s)

People don't like to feel as though you are reading to them. Although you may be reading from a written copy of your stories, make an effort to maintain eye contact with your audience frequently, to use a conversational tone of voice, and to avoid speaking monotonously.

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - NOTE: This topic does not include a practice exercise. You will be able to practice this portion of the module as part of the Final Practice.
-

Step-Action Table

Step	Action
1. Plan and prepare for the meeting	<p>Identify an audience with whom you will share your stories.</p> <p>Arrange the date, time and location of your meeting, and invite your participants.</p> <p>Pre-meditate the materials you will need for the meeting, which may include: paper and pens, flipcharts and markers, handouts, timer, etc.</p> <p>Make enough copies of the Leader Story Feedback Forms (one set of 3 for each participant).</p> <p>You may also wish to provide written copies of your stories (one set for each participant).</p>
2. Open the meeting	<p>Thank your audience for attending.</p> <p>Explain that your purpose today is to share three stories that help explain who you are, and what you intend to accomplish, as a leader. Once they have heard the stories, you would like to gather their feedback and input.</p> <p>Hand out the Leader Stories Feedback Forms.</p>
3. Explain the three types of stories	<p>Briefly explain the three types of leader stories: Who I Am, Who We Are, and Future Story.</p> <p>When you are clear that your audience understands the type of stories and the purpose of the meeting, continue.</p>
4. Share your Who I Am Story	<p>Explain that you will begin by sharing your Who I Am Story.</p> <p>Review the Who I Am Feedback Form, and make sure the participants are clear about the type of feedback you are looking for from them. (If sharing a written copy, wait until after you've spoken the story to hand it out.)</p> <p>Ask someone to time your story, and to stop you at the 3 minute mark.</p> <p>Tell your story verbally.</p>
5. Get feedback on your Who I Am Story	<p>Ask your audience to take a few minutes to write comments on their Feedback Forms.</p> <p>Then, ask them to share some of their comments with you.</p> <p>Take a pulse: Did your Who I Am Story "pass" all its criteria? If not, make sure you are clear on what to do to make improvements.</p>

Topic 4: Sharing Your Leader Stories
Using Leader Stories to Build Shared Vision and Commitment

Step	Action
6. Share and get feedback on your Who We Are Story	<p>Repeat the process you used when sharing your Who I Am Story – with this additional step:</p> <p>Since this audience may have input to share on “Who We Are” (e.g. if they are part of your team, your school, your district, etc.) be sure to capture any additional suggestions that they feel should be included in this story. (If you agree with these suggestions, you can incorporate them when you finalize your stories after the meeting.)</p>
7. Share and get feedback on your Future Story	<p>Repeat the process you used when sharing your Who We Are Story – with this additional step:</p> <p>Before you hand out the Feedback Form or read your Future Story, invite participants to draft their own Future Story. Provide instructions for the “newspaper” activity (imagine the headline and contents of a news story written in the future), provide paper, and give them a few minutes to write their own. Ask them to hold their results until after they hear your Future Story.</p> <p>When participants give you feedback on your Future Story, invite them to tell you about elements that they listed in their Future stories. (If you agree with these suggestions, you can incorporate them when you finalize your stories after the meeting.)</p>
8. Close the meeting	<p>Thank the team for their participation and their feedback.</p> <p>Advise whether, when and how you will follow up with them (e.g., do you intend to share the updated versions of your stories? When do you expect to try these stories with other audiences? Etc.)</p> <p>Collect their Feedback Forms.</p>
9. Finalize your stories	<p>Incorporate any feedback that you feel is appropriate – especially items related to quality criteria. Repeat this process as necessary.</p>

Final Practice

Instructions

- Perform this practice, referring to the topic step-action tables as needed.
- Complete the Final Practice Worksheet, listing results that are realistic based on the information in the practice scenario.
- Check your work.
- Meet with your Performance Coach to review the results and decide what to do next.
- Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
 - Communicating the time and location of the meeting to the participants in advance
 - Preparing and providing copies of a meeting agenda
 - Being prepared with all the necessary materials and resources

Practice Scenario

Recruit a small group (3-5) of “friendly” peers to help you with this Final Practice. Explain that they are simply acting as themselves during this meeting (that is, no role play is required).

Use the Final Practice Worksheet (or create your own) to prepare for the meeting, as a guide while you facilitate the meeting, and as a place to capture your notes from the meeting. Also use the Leader Stories Feedback Forms (See Appendix D), to collect input from participants, or use your own form. Distribute one set of these forms to each participant, and collect the completed forms at the end of the meeting.

Share your leader stories with this group, and gather their feedback and suggestions.

Use their input to finalize your stories. Review your work with your Performance Coach to determine next steps.

Practice Worksheet

List the names of the participants you intend to invite. Place a check by their names when they have been invited.

- | | |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

List the date, time and location of your meeting.

What materials will you need for your meeting (and how many of each)? (Update this list as you fill out the Worksheet). Check off each item when it is collected or prepared.

- | | |
|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

What will you say to open the meeting? Include your purpose, any instructions, and handouts.

What key points do you want to convey about the Who I Am Story?

Practice Worksheet

What key points do you want to convey about the Who We Are Story?

What key points do you want to convey about the Future Story?

What instructions will you give for the Future Story activity?

How will you close the meeting?

Final Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. An appropriate meeting opening is used	<input type="checkbox"/> Participants are welcomed	<input type="checkbox"/> Yes
	<input type="checkbox"/> The purpose is explained	<input type="checkbox"/> No
	<input type="checkbox"/> Materials are handed out (if used)	
2. The Who I Am Story is shared	<input type="checkbox"/> Key points about the Who I Am Story are accurately described to the audience	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> The criteria for a Who I Am Story is shared with participants	
	<input type="checkbox"/> The Who I Am Story is spoken to the audience	
	<input type="checkbox"/> OPTIONAL: The Who I Am Story is also shared in written format	
	<input type="checkbox"/> Feedback is solicited from the audience, and captured for future consideration	

Evidence	Criteria	Proficient? Give Feedback.
3. The Who We Are Story is shared	<input type="checkbox"/> Key points about the Who We Are	<input type="checkbox"/> Yes
	<input type="checkbox"/> Story are accurately described to the audience	<input type="checkbox"/> No
	<input type="checkbox"/> The criteria for a Who We Are Story is shared with participants	
	<input type="checkbox"/> The Who We Are Story is spoken to the participants	
	<input type="checkbox"/> OPTIONAL: Visuals are used to support the verbal story	
	<input type="checkbox"/> OPTIONAL: The Who We Are Story is also shared in written format	
	<input type="checkbox"/> Feedback is solicited from the audience, and is captured for future consideration	
	<input type="checkbox"/> Additional ideas for content are captured from the audience for future consideration	
4. Participants are led through the Future Story exercise	<input type="checkbox"/> Accurate instructions for the activity are given	<input type="checkbox"/> Yes
	<input type="checkbox"/> Participants are given time to write their own Future Story	<input type="checkbox"/> No
	<input type="checkbox"/> Participants are instructed to hold their comments until after the leader's Future Story is shared	

Evidence	Criteria	Proficient? Give Feedback.
5. The Future Story is shared	<input type="checkbox"/> Key points about the Future Story are accurately described to the audience <input type="checkbox"/> The criteria for a Future Story is shared with participants <input type="checkbox"/> The Future Story is spoken to the audience <input type="checkbox"/> OPTIONAL: Visuals are used to support the verbal story <input type="checkbox"/> OPTIONAL: The Future Story is also shared in written format <input type="checkbox"/> Feedback is solicited from the audience, and is captured for future consideration <input type="checkbox"/> Additional ideas for content (from participant's own Future Stories) are solicited from the audience, and captured for future consideration	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Leader stories are finalized	<input type="checkbox"/> The feedback for these stories show that they met the criteria when delivered in the meeting: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story <input type="checkbox"/> The feedback for these stories show that they did not meet the criteria when delivered in the meeting: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story <input type="checkbox"/> These stories were updated after the meeting, until all criteria were met: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story 	<input type="checkbox"/> Yes <input type="checkbox"/> No

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<p>Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i></p>	<p>Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i></p>	<p>Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i></p>	<p>Distinguished Could be Used as a Model to Teach Others</p>

Eligible for Portfolio

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

Turn the page to provide additional written feedback (required).

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Final Assessment

When Can I Take the Final Assessment?

Complete the Final Assessment when you are able to sufficiently execute the module’s performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

When Can I Add the Final Assessment to My Portfolio?

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

Yes	No
<p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> • Final Assessment Performance Checklist • Final Assessment Feedback Form • Module Progress Tracker page • Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc. 	<p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> • Obtain performance feedback from your Performance Coach • Review relevant topics in the module • Repeat Topic Practices and/or the Final Practice • Pursue additional learning, training and experience

**Final Assessment
Instructions**

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
 2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
 3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
 4. Review the following with your Performance Coach:
 - Task-related criteria on the Final Assessment Performance Checklist
 - Cross-cutting leadership skills on the Performance Feedback Form
 - Final Assessment Scenario (on the next page)
 5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
 6. Perform the Final Assessment as follows:
 - In a real school or district setting
 - With a team of teachers, staff, or other leaders as appropriate
 - Observed by your Performance Coach
 7. Retain artifacts from your performance (documents, slides, etc.)
 8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.
-

**Final Assessment
Scenario**

Identify an audience within your school/district that would be interested in learning more about your leadership style, and from whom you can receive feedback on your stories. Ideally, this should be a team on which you serve, or some other group of people with whom you work regularly.

Plan for how you will conduct the meeting to share your Leader Stories and collect feedback. Prepare any materials you need to conduct the meeting.

Conduct the meeting. After the meeting, finalize your Leader Stories based on the feedback you receive.

Final Assessment Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. An appropriate meeting opening is used	<input type="checkbox"/> Participants are welcomed	<input type="checkbox"/> Yes
	<input type="checkbox"/> The purpose is explained	<input type="checkbox"/> No
	<input type="checkbox"/> Materials are handed out (if used)	
2. The Who I Am Story is shared	<input type="checkbox"/> Key points about the Who I Am Story are accurately described to the audience	<input type="checkbox"/> Yes
	<input type="checkbox"/> The criteria for a Who I Am Story is shared with participants	<input type="checkbox"/> No
	<input type="checkbox"/> The Who I Am Story is spoken to the audience	
	<input type="checkbox"/> OPTIONAL: The Who I Am Story is also shared in written format	
	<input type="checkbox"/> Feedback is solicited from the audience, and captured for future consideration	

Evidence	Criteria	Proficient? Give Feedback.
3. The Who We Are Story is shared	<input type="checkbox"/> Key points about the Who We Are	<input type="checkbox"/> Yes
	<input type="checkbox"/> Story are accurately described to the audience	<input type="checkbox"/> No
	<input type="checkbox"/> The criteria for a Who We Are Story is shared with participants	
	<input type="checkbox"/> The Who We Are Story is spoken to the participants	
	<input type="checkbox"/> OPTIONAL: Visuals are used to support the verbal story	
	<input type="checkbox"/> OPTIONAL: The Who We Are Story is also shared in written format	
	<input type="checkbox"/> Feedback is solicited from the audience, and is captured for future consideration	
	<input type="checkbox"/> Additional ideas for content are captured from the audience for future consideration	
4. Participants are led through the Future Story exercise	<input type="checkbox"/> Accurate instructions for the activity are given	<input type="checkbox"/> Yes
	<input type="checkbox"/> Participants are given time to write their own Future Story	<input type="checkbox"/> No
	<input type="checkbox"/> Participants are instructed to hold their comments until after the leader's Future Story is shared	

Evidence	Criteria	Proficient? Give Feedback.
5. The Future Story is shared	<input type="checkbox"/> Key points about the Future Story are accurately described to the audience <input type="checkbox"/> The criteria for a Future Story is shared with participants <input type="checkbox"/> The Future Story is spoken to the audience <input type="checkbox"/> OPTIONAL: Visuals are used to support the verbal story <input type="checkbox"/> OPTIONAL: The Future Story is also shared in written format <input type="checkbox"/> Feedback is solicited from the audience, and is captured for future consideration <input type="checkbox"/> Additional ideas for content (from participant's own Future Stories) are solicited from the audience, and captured for future consideration	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Leader stories are finalized	<input type="checkbox"/> The feedback for these stories show that they met the criteria when delivered in the meeting: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story <input type="checkbox"/> The feedback for these stories show that they did not meet the criteria when delivered in the meeting: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story <input type="checkbox"/> These stories were updated after the meeting, until all criteria were met: <ul style="list-style-type: none"> <input type="checkbox"/> The Who I Am Story <input type="checkbox"/> The Who We Are Story <input type="checkbox"/> The Future Story 	<input type="checkbox"/> Yes <input type="checkbox"/> No

Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<p>Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i></p>	<p>Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i></p>	<p>Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i></p>	<p>Distinguished Could be Used as a Model to Teach Others</p>

Eligible for Portfolio

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

Turn the page to provide additional written feedback (required).

Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Appendix A: Sample Who I Am Story

Provided by: Mike Vanairsdale, Performance Leadership Consultant, GLISI

I am what is commonly referred to as an “alternative career” educator, and here is my story.

I grew up in a small logging town in the state of Washington as the oldest of nine children. Although I did fairly well in high school, I knew that if I was going to be able to attend any of the colleges of my choice, I would need major financial assistance. I applied for and received several scholarships; however, the most lucrative was a four-year Army ROTC scholarship. In 1966, receiving an ROTC scholarship – with its requirement of four years active duty – was not the preferred choice of parents, pastor and friends. However, it was the key to my attending the university of my choice without severe financial burdens at the end of four years.

Four years later I graduated from Gonzaga University and was commissioned as Infantry Officer in the United States Army. And while I looked at the Army as only a source of education, and immediate employment after graduation, I ended up spending 26 years in a career that was one of the most rewarding I could ever imagine – the leading, training and care of our nation’s most precious asset: young American men and women and their families.

As I journeyed through my career, I had the opportunity to command army aviation units at increasingly higher levels, culminating with a command of an aviation brigade in the Republic of Panama, responsible for all naval operations in Central and South America.

Early on in my command experience, one of my mentors suggested that I develop a leadership philosophy in order to communicate my personal mission, vision, and values to my organization...and also to provide me a safe “Linus blanket” when decisions got tough.

When I transitioned into Educational Leadership, I developed a similar document that communicated my vision and values to the organization. I will share that philosophy with you.

My educational leadership philosophy provides the framework in which I operate and the vision of what I want this organization to become. It is my belief that a better understanding of my vision and beliefs by the system leaders will result in the vision, energy, commitment and determination to make this a reality. My vision is focused on one goal – to make our school system the best school system in the United States. We’re going to do that by closing the achievement gap, while continuing to make great strides in student achievement at all levels. The four imperatives of my philosophy are Values, High Expectations, Care and Training:

Values. *Values are the foundation of leadership and provide bonding in the organization. Integrity, loyalty, candor, competence, commitment, courage, and selfless service are the values that glue the organization together. At the top of this list is integrity – nothing less than absolute integrity is acceptable. Loyalty is a two-way street – demanding candor and disagreement if necessary, but requiring 100% support if overruled. Excellent leaders at all levels know their job and know it well; they are proficient in all areas, from the front office to the classroom. They are professionally and morally sound. Leaders lead by example; set high but achievable standards; use common sense; and “have their finger on the pulse” of their school or department and the community. Great leaders are bold and innovative, and are able to delegate authority because of trust.*

(Continued next page)

They provide accountability throughout the organization by fixing responsibility. Great leaders give freely of themselves to their organization. People in the organization – teachers, students and staff– and in the community will respond only in the measure leaders give of themselves. Excellent leaders are team builders – within their organization, among their peers, and with their superiors. This is absolutely critical in our schools. I encourage you to compete against standards, not against each other. Success is not a zero-sum game – all can be successful.

High Expectations. *“Dream no small dreams, for they have no power to move the hearts of men.” - Goethe. If you aim low, you hit low. We must truly believe that each child we teach can meet our educational goals, or we will fail to close the achievement gap. We must truly believe that every child can learn and will meet our very high expectations. And, we have a bigger challenge: through our leadership, we must convince teachers and staff that all kids can learn to our standards. We must convince parents and community of the same. If we do not have high expectations for all of our students, then the only certainty is that not all of our students will achieve. Creating this climate of high expectations, I believe, is our biggest challenge.*

Care. *Students, teachers and staff members are not “in” the school system; they are the school system. Every student and employee is a critical component of the organization. Because each is a contributor to the successful meeting of goals, each must sense his or her worth and importance. Encourage the heart. Acts of kindness, consideration, and moments of praise for jobs well done provide the climate where a happy, productive staff becomes a great team. Counsel good performance as well as bad, both orally and in writing. Obscenely reward outstanding performance!*

Training. *Teacher training through staff development, and through programs that lead to higher academic degrees and national certification, are my training priorities. We must maintain our expectations for excellence in our teaching staffs, with challenging, innovative, and realistic training that models the best classroom performance. This training must be planned and executed by our leaders. Training for employees who work outside the classroom is also essential to the success of our system. Individual training and development opportunities, from the lowest rungs to the top leadership levels, are critical to bring out the best in the organization. The leader sets the tone by encouraging self-improvement and continuous learning.*

Our mission is to make this system the best system it can be. My goal is to develop a team grounded in mutual trust, respect and confidence. We must strive to create a climate that allows every member of the team feel good about what he or she does. We must ensure that all employees have the opportunity to succeed. John F. Kennedy, in an address at Rice University in 1962, understood our challenges as educators: he said, “If history teaches us anything, it is that man in his quest for knowledge and progress is determined and cannot be deterred.” We must be determined to make this a great school system. We must not be deterred.” I ask each of you to be a part of this team – a team that believes we can reach our goal of world class student performance– across the county. The time is now. The challenge is upon us. It is a daunting challenge. However, let us not forget – the greater the challenge, the greater the triumph.

As I continue to work in the wonderful profession of K-12 educational leadership, I find these imperatives to hold true. I hope that what I have shared with you today may be of assistance on your own leadership journey.

Appendix B: Sample Who We Are Story

Provided by: Gene Trammell, Superintendent, Baldwin County Schools (Georgia)

When Deb emailed me to ask if I would tell you a story of who we are in Baldwin County, I was delighted to be given the opportunity to talk about my teammates.

Like our governor, I am a fan of using analogies. If you are familiar with the Harry Potter books you will understand the analogy I have chosen. The game of Quidditch is a major part of the wizardry that Harry encounters at Hogwarts – it is an exciting sport!! Quidditch is a game of skill and strategy – a cross between soccer, baseball, and basketball played up in the air on flying broomsticks!!

Working to improve schools is much like Harry Potter's Quidditch game. It too requires skills and strategy. Think of it – A mid-air ball game?? Haven't we all had those days when we felt we were so up in the air we couldn't score a point despite our best efforts? Like Harry we in Baldwin County daily seek to capture our Golden Snitch – the winged golden ball – which for us is the goal of improving schools – the focus that sometimes appears so elusive.

In Harry Potter's Quidditch game, a quaffle is used to score goals – for us planning and school initiatives are our Quaffles – and we bat them around quite a bit – sometimes we have too many in the air at one time and focusing on the ultimate goal becomes difficult. There are also Bludgers in a Quidditch game – these Bludgers are what Quidditch players want to avoid – you don't want to be hit by a Bludger. In Baldwin County we have our Bludgers as I am sure you have in your system. Two that quickly come to mind are LACK OF TIME and LACK OF MONEY – Need I say more?

The Quidditch game has a number of players – there is a Seeker, a Keeper, Chasers, and Beaters. The Seeker tries to catch the Golden Snitch, The Keeper guards the goalpost, the Chasers try to score by throwing the Quaffle through one of the hoops. The Beaters try to keep the Bludgers away from their team and knock them towards the opposing team.

I like to think that as Superintendent I most often play the role of the Seeker as I must be on the cutting edge – seeking and envisioning new horizons in our search for improvement. Our leadership team members are the Chasers as they work so hard in their respective roles to score school improvement points by achieving both school and system goals, and often our Finance Officer is cast in the role of Keeper as he must guard our financial goalposts. In the role of Beaters we have a number of external forces in the Baldwin county community – our parents and business partners – who often protect us from the Bludgers who work to defeat us.

As we work together as a team in our efforts to score goals for school improvement to benefit the students of Baldwin County, it is most often my role to remind my team that this is a great challenge – an opportunity. That “the Worst of Times” is also the “Best of Times.” It is important to remember that so far in the Harry Potter stories, Harry has not only Survived his Quidditch games but he has Thrived on the experience. School Improvement seems a never-ending quest – we don't know the final outcome, but we in Baldwin County go forth as Harry Potter does with determination and faith.

Appendix C: Sample Future Story

Provided by: Terry Sark, Superintendent, Wilkinson County Schools (Georgia)

Hermie and Wormie are characters from a story written by Max Lucado, an inspirational author. Both see themselves as plain, ordinary, boring, slow caterpillars who have no unique, interesting, or colorful characteristics. Hermie makes the statement that he can't fly, sting or stand. All he can do is crawl and very slowly. In fact, Hermie asks another caterpillar who has some beautiful spots to describe him. The caterpillar stammers and stutters for a few moments as he looks at Hermie and says, "ordinary, you're just ordinary."

Hermie really admires a beautiful butterfly he sees on several occasions. He loves the way the butterfly seems to just soar through the sky. He admires this flying so much that he grabs two leaves and attempts to fly by jumping off a limb, while flapping the two leaves like wings. Unfortunately, he just ends up on his face on the ground.

Hermie and Wormie meet several characters during the story that they try to imitate: a snail who carries his protective shell with him, an ant who can carry 50 times his own weight, and a colorful lady bug with beautiful spots. Of course, they cannot imitate any of those so they end up facing God and questioning why they are so ordinary. They just don't understand why they can't be like others around them, especially the butterfly. Well, God tells them not to worry because He is not finished with them yet.

As the story ends, both Hermie and Wormie fall asleep and wake up as butterflies. They get so excited as they soar through the sky with new wings.

I envision a future where all students soar just like Hermie and Wormie. Students who may have felt plain or common with no special academic talents or abilities, soaring through calculus, statistics, physics and other AP classes which are now just the norm, not the exception. Students who are encouraged by a staff that continues "give students wings" ...but I also envision a place where they are "given new hearts and new minds" and their determination to learn is nurtured every day by a staff who genuinely loves and cares for each one of them...a staff who will settle for nothing but the best for each student. No one is left to be just plain and ordinary. All students and staff have that love for learning that can only be satisfied as they seek new learning together.

I envision a place where test score concerns, time concerns, financial concerns, student apathy concerns and lack of parental involvement concerns are just discussions in a history class and the students are amused and can't believe that those things could have ever been problems anyway. I envision a place where students say to their friends, just a Wormie said to Hermie after they got their wings: "Come on Hermie. Why are you slowing down? Let's get going."

Appendix D: Leader Story Feedback Form

The Who I Am Story

Please indicate whether the leader's Who I Am Story met the following criteria:

- Defines the leaders beliefs
- Describes the leader's background
- Describes lessons learned by the leader
- Explains how the leader's experiences impact the way he / she plans to lead
- Describes the people and situations that have impacted the leader and his / her leadership style
- Does not include any of the following:
 - Spelling errors or typos (if reviewed in written form)
 - Grammatical errors
 - Redundant or verbose language
 - Unexplained jargon or terms
 - Illogical sequencing of information, facts and figures
 - Tone that is either too formal, or too informal, for the audience
- Was delivered in 3 minutes or less
- List any additional questions, comments or suggestions below (use the back if necessary):

The Who We Are Story

Please indicate whether the leader's Who We Are Story met the following criteria:

- Describes the school's/district's demographics
- Describes the school's/district's improvement needs
- Describes the culture of the school/district
- Describes the difference between the "As Is" school culture, and the "To Be" culture of "Better-Seekers"
- Explains the improvement strategies the leader plans to initiate
- Does not include any of the following:
 - Spelling errors or typos (if reviewed in written form)
 - Grammatical errors
 - Redundant or verbose language
 - Unexplained jargon or terms
 - Illogical sequencing of information, facts and figures
 - Tone that is either too formal, or too informal, for the audience
- OPTIONAL: Visual aids (such as PowerPoint slides, graphs, data, charts, etc.) are used to illustrate the story
 - Visuals are appropriate for the content and the audience
 - Visuals enhance the presentation, rather than distract from it
- Was delivered in 3 minutes or less
- List any additional questions, comments or suggestions below (use the back if necessary):

The Future Story

Please indicate whether the leader's Future Story met the following criteria:

- Depicts the leader's vision of the school's/district's future state in a fictional or fantasy account
- Is NOT an explanation of the leader's five-year strategic plan (or other specific action plan details)
- Portrays the leader (and his / her staff) as protagonist(s) of the story
- Depicts the challenges/obstacles that the leader/staff/stakeholders will face along the improvement path
- Incorporates examples of how other organizations have achieved their "To Be" states
- Discusses the future needs of the school / district / community in broad terms
- Describes what the future "victories" will "look like" and "feel like"
- Speaks to all audiences (or can easily be tailored to fit any audience)
- Clearly conveys the leader's message
- Conveys a message that is consistent with the leader's vision
- Touches people emotionally
- Does not include any of the following:
 - Spelling errors or typos (if reviewed in written form)
 - Grammatical errors
 - Redundant or verbose language
 - Unexplained jargon or terms
 - Illogical sequencing of information, facts and figures
 - Tone that is either too formal, or too informal, for the audience
- OPTIONAL: Visual aids (such as PowerPoint slides, graphs, data, charts, etc.) are used to illustrate the story
 - Visuals are appropriate for the content and the audience
 - Visuals enhance the presentation, rather than distract from it
- Was delivered in 3 minutes or less
- List any additional questions, comments or suggestions below (use the back if necessary):

Recommended Reading and Resources

Tichy, Noel M. (2002). The Leadership Engine: How Winning Companies Build Leaders at Every Level. New York, NY: HarperCollins Publishers Inc.

Georgia's Leadership Institute for School Improvement. (2005). Initiating School Improvement (Participant Guide and PowerPoint presentation from Leadership Base_Camp learning event). Atlanta, GA: GLISI.

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