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IT'S A WONDERFUL LIFE:
Leading Through Service

Featuring Dr. Margaret Wheatley,
Author of several best-selling books on
Organizational behavior, including
"Leadership and the New Science"

Facilitator Guide

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A Personal Word about This Video

I was first introduced to the concept of servant leadership when I read an essay called *The Servant As Leader*, by Robert K. Greenleaf. In 1970, when the essay was written, organizations were far less willing to adopt policies that served their workforce and their communities. In recent years, this has dramatically changed. Increasingly, I am aware of organizations adopting worker- and community-friendly programs.

Leading through service" and "servant leadership" just gives a name to what I think is a fundamentally human process - our desire to serve and help one another.

We seek leadership positions, even temporary or short-lived ones, because we believe in people. We want to help them do good work and have satisfying lives. For over fifty years, we have documented research that shows that servant leadership, whether it be a C.E.O., a project manager, or the head of a small team, always results in substantially greater productivity and employee satisfaction.

I believe that by utilizing scenes from the classic movie, "It's A Wonderful Life," to vividly dramatize the benefits of leading through service, we have created a training tool that will greatly assist you in communicating this important concept to your colleagues.

Dr. Margaret J. Wheatley

Author, *Leadership & The New Science*
Co-author, *A Simpler Way*
A Wonderful Life: Leading Through Service

Introduction

Using clips from the classic black and white movie, "It's a Wonderful Life " starring James Stewart. this training program presents a very current and ground breaking leadership model. Dr. Margaret J. Wheatley who has written on the subject of servant leaders, narrates the video. In It s A Wonderful Life. Leading Through Service, she highlights key learning points and focuses attention on real-world parallels that will help participants relate their learning to their own work lives and personal situations.

Viewers see the tremendous challenge George Bailey. Stewart's character, faces as he is forced to choose between his dreams of leaving the small town of Bedford Falls for untold adventures in the world and staying put for the rest of his life Without planning to, he finds himself staying, combating Old Man Potter' the slum landlord, for the soul and safety of the community. To defend his friends and neighbors against Potter's mercenary plans, George chooses to remain in Bedford Falls and succeed his father as president of Bailey s Building & Loan His life. so different than he had imagined, becomes one of serving others - putting their needs before his own and performing many small acts of kindness to those around him. In choosing to serve others first, George leads them to empower themselves and to play their own vital role in the fight to keep their homes and prosper. The video tells a rousing tale about the good one man can do by serving those around him.

In her essay, What Is Our Work?, Dr. Wheatley contrasts the "old story" of leadership with the "new story" of the servant leader. Old-story leaders, in our mechanistic Western culture, are characterized by the exercise of power, dominion, and control. Their role is to "provide the organizing energy for a system that is believed to have no internal capacities for self-creation, self- organization or self-correction." In contrast, the new story is a "tale of life. where human creativity and relationships are the organizing energies where there is no such thing as a separate individual, and no need for a leader to do it all." The new-story leader first serves others and in doing so elicits peoples contribution and best serves the organization.

In this training program participants will learn that "new story" servant leaders:

- Can come from anywhere in the organization.
- Seek to serve others.
- Recognize when courage is called for.
- Speak truthfully.
- Encourage others to live up to their potential.
- Are a colleague others can depend on.
- Naturally perform small acts of kindness.

This guide suggests ways in which you can engage with participants in exploring the concept of the servant leader and planning how to apply what they have learned when they return to the job.

A Wonderful Life: Leading Through Service

About This Guide

This booklet is designed to be a complete, self-explanatory facilitator guide. Please read through the guide before facilitating this course.

This Guide

On page 10 of this guide, you will find outlines that detail the recommended procedure for conducting this course. There are two time frames - a two-and-a half-hour program and a one-hour program. The longer you spend on the program, the more impact it will have on the participants, so choose the most extensive option your schedule allows. The times indicated in the outlines are approximate - depending upon the length of the group discussion and exercises, the program may take more or less time than indicated. You may want to allow more time for the entire program, if circumstances permit.

Exercises

Also included in this package is a series of exercises designed to be used with the two program options. This facilitator guide details how each exercise should be used and how much time to allow, and includes reprints of the worksheets for your convenience. Each exercise is designed to explore and reinforce specific sections of the video, which provides the backbone for this course.

Materials and Preparation

The exercises are left unbound so you can copy them for distribution to the group. You will need to prepare the appropriate number for your group. See the facilitator notes that accompany each exercise for details.

Program Objectives

This training program is designed to be an exciting and educational group learning experience. After completing the *It's A Wonderful Life: Leading Through Service* program, participants will be able to demonstrate an understanding of the role and characteristics of servant leaders, who:

- 1. Can come from anywhere in the organization**
 - Anyone can be a servant leader, regardless of rank or title.
 - The power of servant leaders develops from their ability to create through trust meaningful, committed relationships in which we know we can rely on one another.
- 2. Seek to serve others**
 - Servant leaders act on a natural human impulse to help others.
 - They do not believe that self-interest makes the world go round.
- 3. Recognize when courage is called for**
 - They are able to admit when they do not know the answer.
 - They are not afraid to ask colleagues for help.
 - They stand up for someone who is being scapegoated.
- 4. Speak truthfully**
 - They are able to tell colleagues what they are experiencing and openly describe what is going on.
 - They listen willingly and appreciatively to others.
 - They know that speaking truthfully leads us to another level of teamwork and that better relationships and improved productivity will result.
- 5. Encourage people to live up to their potential**
 - By providing encouragement and the necessary resources, servant leaders help team members realize their potential in their work and personal lives.
 - Persuasion, not coercion, encourages people to help and support others.
 - Servant leaders trust the ability of others to come up with solutions that are in their own best interest and the best interests of the organization.
- 6. Are a colleague others can depend on**
 - People trust servant leaders - they have demonstrated their dependability and commitment time and time again.
 - Our lives develop meaning - and a legacy is created - through small acts that over time make a big difference.
- 7. Prove that small acts of kindness can have large results**
 - Small acts of kindness do matter, even in large and seemingly impersonal organizations.
 - The way we live our lives, even in the small moments, can create meaningful change.

Materials and Logistics

For this program, you will need the following:

- A room large enough to accommodate all the participants seated at a table. If there are more than 10 participants, you will need two or more tables.
- A video cassette player (VCR) and monitor.
- Two flipcharts, a roll of tape, and a box of markers.
- One copy per participant of each of the exercises you plan to use (originals are provided in this package) depending on which program option you choose (see page 10 for more information).
- Note pads and writing instruments for each participant.
- Name tents and/or badges.

Program Set-up

Before beginning the program, it is recommended that you:

- Familiarize yourself thoroughly with this guide, the video, and the participant exercises.
- Choose one of the two program options from page 10 of this guide, depending on your objectives and available time.
- Reserve a room large enough for the expected number of participants (if necessary).
- Position the monitor so that it is easily visible to all participants.
- Cue up the video and adjust the sound so that you can hear it in the back of the room.
- Set up the flipchart and write the program agenda on it.

Program Options

Option 1-3 Hours

This option is designed for a three-hour training program, during which participants view the video, engage in a discussion of the major issues presented in the video, and practice their new skills in a group exercise and role plays.

Time	Description
10 Minutes	Introductions
25 Minutes	Video Viewing
30 Minutes	Group Discussion
10 Minutes	Break (optional)
35 Minutes	Group Exercise (alternative A or B)
40 Minutes	Role Play Exercises
10 Minutes	Conclusion and Key Take-Aways

Handouts Needed

Worksheet A:	Video Observation Sheet
Worksheet B:	Key Take-Aways
Worksheet C-1:	Group Exercise (alternative A)
Worksheet C-2:	Group Exercise (alternative A)
Worksheet C-3:	Group Exercise (alternative B)
Worksheet D-1:	Write Your Own Role Play
Worksheet D-2:	Role Play Observation Sheet
Worksheet D-3:	Suggestions for Effective Role Plays

Option 2-1.5 Hours

This option is designed for a one-and-a-half hour training program, during which participants view the video and engage in a discussion of the major issues it presents.

Time	Description
10 Minutes	Introduction
25 Minutes	Video Viewing
45 Minutes	Group Discussion
10 Minutes	Conclusion and Key Take-Aways

Handouts Needed

Worksheet A:	Video Observation Sheet
Worksheet B:	Key Take-Aways

Option 1: 3 Hour Training Program

PROGRAM AGENDA

Time	Description
10 minutes	Introduction
25 minutes	Video Viewing
30 minutes	Group Discussion
10 minutes	Break (optional)
35 minutes	Group Exercise
40 minutes	Role Play Exercises
10 minutes	Conclusion/Key Take-Aways

OPTION 1 (3 HOURS)

Learning Objectives

After completing this session participants will be able to:

- Describe the characteristics of servant leaders and the role servant leaders play in an organization and in the lives of colleagues.
- Recognize feelings associated with being served and serving others.
- Discuss possible changes and outcomes - in themselves and in others - that may result when they lead through service.
- Anticipate some of the obstacles they may experience as servant leaders in their organization.

OPTION 1 (3 HOURS)

Introduction

(10 minutes)

Objective:

- To introduce the It's A Wonderful Life: Leading Through Service training program.

Procedure:

- Prepare the room as outlined on pages 8-9 of this guide.
- Welcome participants as they enter and introduce yourself (if necessary).
- Say, "This two-and-a-half-hour program is designed to help us take a meaningful look at the concept of the servant leader."
- Go over the program agenda you have written on the flipchart.
- Say, "Before we start, let's talk a little about servant leadership as it applies to you. First of all, this may be a new idea for some of you. What do we mean by the term 'servant leader'?" (Write down the group's responses on blank page of the flipchart.)

Possible answers: Servant leaders think first of serving others. They can come from anywhere in the organization - they may not be designated leaders or hold power. They follow a natural impulse to help others. They may not have all the answers and are not afraid to ask for help. They're open and honest about their own feelings and deal with things openly. They encourage others to take responsibility for their own actions, to live up to their potential, and to help and support others. People know they can depend on servant leaders and trust them. They do not hesitate to perform small acts of kindness. They know that what's right for individuals will also be right for the organization.

- Note: If you prefer to show the video before providing the answer:

Say, "Before we agree on just what a servant leader is, let's watch the video. After that, we will talk about what you have learned and how you can apply that to your job."

OPTION 1 (3 HOURS)

Video Viewing and Group Discussion

(55 minutes)

Objective:

- To view the video and build awareness of the role and characteristics of the servant leader.

Procedure:

- For this exercise, you will need worksheet A, Video Observation Sheet. (See page 16.) Make sure that you have adequate copies for all participants. Do not pass out these sheets until after the video.
- Play the video (prepared according to page 9 of this guide). The video takes approximately 25 minutes.
- When the video is finished, pass out the observation sheets and ask the participants to complete them. Allow 15 minutes for participants to complete the observation sheets.
- When they have finished, begin a 15-minute group discussion based on the observation sheet questions.
- Using the flipchart, write down participant responses. See the Key Learning Points on the following page for suggestions.
- Ask if there are any questions before moving on.

TIP: If you are having trouble getting responses from the participants, try using the following methods:

- Ask for their opinions.
- Ask open-ended questions and wait patiently for a response.
- Call on people who have not spoken directly.
- Ask for comments on opinions already expressed.
- Compliment and thank those who do contribute.
- Take a break and privately ask those who are particularly quiet if there is a problem.

-Continued-

OPTION 1 (3 HOURS)

Video Viewing and Group Discussion, cont

Key Learning Points

Servant leaders can come from anywhere in the organization

- Anyone can be a servant leader, regardless of rank or title.
- The power of servant leaders develops from their ability to create trust through meaningful, committed relationships in which we know we can rely on one another.

Servant leaders seek to serve others

- Servant leaders act on a natural human impulse to help others.
- They do not believe that self-interest makes the world go round

Servant leaders recognize when courage is called for

- They are able to admit when they do not know the answer.
- They are not afraid to ask colleagues for help.
- They stand up for someone who is being scapegoated.

Servant leaders speak truthfully

- They are able to tell colleagues what they are experiencing and openly describe what is going on.
- They listen willingly and appreciatively to other's stories.
- They know that speaking truthfully leads us to another level of teamwork and that better relationships and improved productivity will result.

Servant leaders encourage people to live up to their potential

- By providing encouragement and the necessary resources, servant leaders help team members realize their potential in their work and personal lives.
- Persuasion, not coercion, encourages people to help and support others.
- Servant leaders trust the ability of others to come up with solutions that are in their own best interest and the best interests of the organization.

Servant leaders are a colleague others can depend on

- People trust servant leaders - they have demonstrated their dependability and commitment time and time again.
- Our lives develop meaning - and a legacy is created - through small acts that over time make a big difference.

Servant leaders prove that small acts of kindness can have large results

- Small acts of kindness do matter, even in large and seemingly impersonal organizations.
- The way we live our lives, even in the small moments, can create meaningful change.

Worksheet A: Video Observation Sheet

Objective: To record your observations from the video.

Power: How did George Bailey's "David" relate to Old Man Potter's "Goliath"? What was the source of George's power?

Service: How did George demonstrate the natural human impulse to serve others? How was his behavior different from Potter's? What examples of the impulse to serve others have you seen in your work or personal life?

Courage: What did George do when he did not have the answer to a problem He was facing? Who were some of the people he defended? What would you have done in George's situation?

Truthfulness: How did George deal with his feelings in his interactions with colleagues and the people of Bedford Falls? How did he respond to their stories and their feelings? What examples did you see of better teamwork and improved relationships as a result of George's behavior?

Encouragement: What did George do to encourage people to live up to their potential? How do you think the people you know might respond to interventions like George's?

Dependability: How did George gain his neighbors' trust? What were some of the ways George demonstrated his commitment to them? What examples of dependability and commitment have you seen in your work or personal life?

Creating change: What acts of kindness helped to create meaningful change in the life of the community of Bedford Falls? What results have you seen in your own life from small acts of kindness?

Think about your organization, department, division, or work team. What could you do as a servant leader in your work setting? What changes do you think might result from serving your co-workers courageously, speaking truthfully, encouraging them to live up to their potential, and proving your dependability through small acts of kindness? What obstacles might you need to anticipate?

OPTION 1 (3 HOURS)

This facilitator guide offers two alternatives for the 35-minute group exercise.

- Group Exercise (A) uses role plays to provide participants an opportunity to practice the skills of servant leadership in dealing with a teammate with "attitude."
- Group Exercise (B) uses story-telling and reflection to provide participants an opportunity to consider their experiences with servant leadership and to examine their assumptions about servant leadership.

Both these alternatives will:

- (1) Help participants examine the behavior of a servant leader in a situation they can relate to, and
- (2) Test their responses as servant leaders in meeting organizational challenges.

Choose the alternative that works best for you and the participants you will be working with.

OPTION 1 (3 HOURS)

Group Exercise: Alternative A

(35 minutes)

Objective:

- To practice the skills of servant leadership through a group exercise. -

Procedure:

- If time permits, give the group a 10-minute break before beginning.
- For groups of more than 10 people, divide the participants into two teams of equal size for this exercise.
- Say, "Please read the instructions on worksheet C-1, Group Exercise, and begin the exercise when you have finished. You have 10 minutes to complete Part I of the exercise." (See pages 21-22.)
- Give the group 10 minutes to complete Part I of the exercise.
- At the end of 10 minutes, bring the participants back together. Give them 5 minutes to share their ideas for a course of action.
- (Optional) If time allows, use a blank flipchart page to summarize each course of action.
- After participants have shared their responses to Part I of the exercise, encourage them to discuss the different responses and foreseeable problems, solutions, and/or alternatives.
- Say, "Use Part II of the worksheet to record the group's ideas. You will have 10 minutes to complete Part II of the exercise."
- Remind participants, "Your objective is to work as a team to help each other find and develop comfortable ways to help others."
- Tell each team. "Write some of your preferred approaches to helping Chris Foster on a blank page of the flipchart."
- (Optional) Debrief the group(s). If time allows, have a discussion about what approaches have worked for them or what approach they plan to try the job. Then, focus on what principles from the video the group was able to employ in serving and leading others.

Worksheet C-1: Group Exercise

Part I

Objective: For individual participants to consider the issue at hand and develop their own course of action.

Background: Your company has recently been acquired by a competitor. It is expected that more than half the employees will be laid off by the new owners. Fortunately, most are highly skilled, and your company is located in an area where their skills are in demand. As a member of the Transition Team, you are responsible for coming up with a plan for helping those folks find new jobs, within the next three months, if possible. The team has been told to use all available resources in supporting the new job placements.

Scenario: The Transition Team meets tomorrow to begin mapping out a plan for laid-off employees. Already you are picking up vibes that Chris Foster, another team member, is convinced that this is "just an exercise, they're only window-dressing to keep us quiet and make the managers look good." You know that Chris has some planning skills that would be useful to the team and would help the people who will be losing their jobs. But you wonder if Chris' attitude is self-protective, assumed out of fear of losing his/her current job and facing a new challenge. Unless Chris' attitude changes, you fear, the potential contributions of a team member will be lost, and other employees may not receive all the support they need in their upcoming job search.

Take five minutes to formulate your approach with Chris at tomorrow's meeting and the steps you would take to turn things around.

Worksheet C-1: Group Exercise, cont.

Part II

Objective: For the group as a whole to see the behaviors of a servant leader acting to empower another person.

As a group using what you have learned in the video, begin by considering the various ways participants might be helpful to colleagues. Discuss foreseeable problems, solutions, and/or alternative approaches. Keep in mind the principle; of servant leadership illustrated in the video.

Next look at the specific problem presented by Chris' attitude. While each team member will have his or her own preferred style, use this exercise to help each other find the most comfortable and effective ways to approach Chris.

Worksheet C-2: Role Play Observation Sheet

Where in the organization did the servant leader come from? What was his or her title or rank? How did the actions of the servant leader affect Chris? The other participants, if any?

What did the servant leader do to help Chris, rather than act from his or her self-interest? If help was offered, how was it received? How productive was the conversation between the servant leader, Chris, and others (if any)?

Did the servant leader admit he or she might not have all the answers? Did it require courage for the servant leader to ask Chris for help or defend his/her interests? Explain.

Was the servant leader truthful and forthright in describing his or her feelings? Did he or she listen willingly to Chris' story? What improvement, if any, did you see in the relationship between Chris and the servant leader? Others (if any)?

Did the servant leader (or the person who could have been a servant leader had he or she chosen to do so) encourage Chris to live up to his or her potential? What did the servant leader do to support Chris? Did the servant leader encourage Chris to help and support others? How did Chris respond?

How did the servant leader demonstrate commitment and dependability to the team and to Chris? Did Chris trust the words and actions of the servant leader? What evidence did you see of such trust?

What did you see or hear that would indicate a change in Chris' attitude? What do you think might happen at tomorrow's meeting?

OPTION 1 (3 HOURS)

Group Exercise: Alternative B

(35 minutes)

Objective:

- To recall experiences of servant leadership - both as the person served and as the servant leader - and to consider the impact of these experiences on how you perceive your role within the organization.

Procedure:

- If time permits, give the group a 10-minute break before beginning.
- Divide the participants into groups of 5-8.
- Say, "Often in our work lives, we tend not to deal with our feelings, but feelings as well as facts affect our perceptions of any experience and how we deal with it. By examining our feelings and assumptions we can understand better what motivates us, both as leaders and as colleagues."

"This exercise gives you an opportunity to look at your assumptions about leadership and the role of a servant leader and to consider how these assumptions - positive and negative - have affected your outlook and your leadership behavior."

- Tell the group they will be working in small groups, telling their stories and listening to the stories of their teammates.
- Say, "The exercise is based on your own experience of servant leadership both as a receiver and also as the person who gives to others. You'll do the exercise in two parts."
- Say, "In Part I. you'll be talking about times you were served by a leader, describing how you experienced kindness and support. As you tell your story, let your teammates know how you reacted to being served and how you feel about those leaders now."
- Tell the group that, working in teams, they will have 15 minutes for this part of the exercise. Remind them that after everyone has shared their experience as recipients, they should begin Part II.

OPTION 1 (3 HOURS)

Group Exercise (Alternative B), cont.

Say, "In Part II. I'd like you to talk about being the giver, a person who served others - or who might have served others. Describe times when you have or have not responded to others' needs. Notice what kept you from serving - fear politics, time pressures, etc. Be sure to tell your teammates what it felt like when you did step forward."

- Tell participants they will have 15 minutes for this part of the exercise. should find a quiet place (or a corner of the room) now and begin their discussion. Remind them that the instructions you've just given are printed on Worksheet C-3.
- Tell them you will call time in 30 minutes, when everyone will come back together to debrief.

Debrief

- At the end of 30 minutes, after the teams have completed Parts I and II of Group Exercise, Alternative B, bring them all together and take 5 minutes to debrief the discussions.
- Ask the participants, "How did your team's experiences, assumptions, and feelings compare with those of the other teams? What was similar? Different?"
- Ask, "What new insights did you gain, if any?"
- Use a blank sheet on the flipchart to record participants' responses.

Worksheet C-3: Group Exercise

Part I

Objective: To recall and discuss your experience when you were served by a leader, and to consider the impact of your experience on how you see your role as a colleague.

Think about a time when you were served, when you were the recipient of others' acts of kindness and support. Briefly describe the situation and what happened.

What did it feel like to be served by a servant leader? Were you comfortable? Did you trust this person? Did the support you received empower you to act in a similar way or inspire you to be more aware of those around you? Try to convey your reactions and feelings to your teammates.

As you look back on this experience, how do you feel now about the leader who served you? In telling your experience (rather than George Bailey's), what insights or understanding are you aware of now?

Part II

Objective: To recall and discuss your experience when you were the giver, and to examine the reasons that kept you from serving others or your assumptions and feelings when you acted as a servant leader.

Think about a time when you either have or have not responded to the needs of others.

If you did not respond, what kept you from service (for example, fear, politics, time pressures, etc.)? Briefly describe the circumstances and your reasons to your teammates.

If you did respond, explain how you felt when you did step forward.

In either case, what have you learned from your experience?

Option 1 (3 hours) M

Role Play (40 minutes)

Objective: To practice the skills of servant leadership.

Procedure:

- For this exercise, you'll need copies of worksheets D-1, D-2, and D-3 (see pages 27-30) for each participant. Distribute them when you're ready to begin.
- Say, "Working on your own, use worksheet D-1 to write a role play based on a real-life servant leader situation you have experienced or know about. The example you use can be a work situation or a personal one. You have 10 minutes for this part of the exercise."
- Say, "Be sure to include the following information:
 - What roles were involved?
 - What was the issue?
 - What triggered the situation?
 - What was the viewpoint/attitude of each character regarding this situation?
 - Why was it hard/easy for the servant leader to act?"
- At the end of 10 minutes, break the group into teams of 3-5 participants.
- Say, "Each team will be doing two role plays. Choose two of your four role plays to enact. Then choose two or more people to enact the first role play and at least one person to observe."

Note: If your schedule allows more time, you may choose to use more role plays. For example, with an additional 30 minutes, the teams could practice up to four role plays - or you might choose to let the role plays run longer.

- Say, "After you have chosen which role plays your team will enact and decided who will role play and who will observe, begin the first role play. Take 3 minutes to discuss the role play and 7 minutes to enact it. When you have finished the first role play, begin the second. Switch roles for the second role play and repeat the process. You have 20 minutes for the two role plays."
- Walk around and listen to the participants as they role play. If they are having difficulty, say, "Time out!" and ask, "How's it going?"

TIP: If necessary, clarify the role-playing procedure, making sure everyone understands his or her role and the purpose of the exercise. Do not allow them to give up. It is important that participants experience what a servant leader might feel in the situation and to test out their behavior in their roles.

-Continued-

OPTION 1 (3 HOURS)

Role Play, cont.

Debrief

- At the end of the second role play, bring the group back together and take minutes to debrief the role plays.
- **Ask** the observers, "What did you see as you watched the role plays?" Discuss the questions presented on the observation sheet.
- **Ask** the group, "How did the role plays change your perspective?"
- Use a blank sheet on the flipchart to record the group's responses.

Worksheet D-1:

Write Your Own Role Play

Objective:

- To practice the behavior of the servant leader in helping others.

Preparation:

- Working by yourself, you will have 10 minutes to identify and describe a real-life situation. The situation should be work-related.
- Your task is to describe an event or situation in which a servant leader helped or could have helped another.
- On the other side of this worksheet, write the key facts of the situation, including a description of the people involved.
- When the 10 minutes are up, your facilitator will assign you to a team of three or more. As a team, review all four scenarios and decide which two scenarios your team will role play.
- The author of the first scenario will have 3 minutes to explain it. and the team will have 7 minutes to role play. Depending on the number of roles, at least one team member will observe and record the role play.
- When your team has finished role playing the first situation, switch to the second scenario and repeat the process. Be sure to switch roles as well, so that a different person is the observer, the servant leader, and the person needing help.

Observing the Role Play:

- If you are not playing a role in the exercise, you will be observing it. Use worksheet D-2 to record your observations. After the role plays, you will have the opportunity to share your feedback with the group.

Worksheet D-1: Role Play, cont.

Background Information

Situation:

Briefly describe a situation in which a servant leader helped/could have helped another, to the benefit of the individual involved and the organization as a whole.

People Involved:

Who was involved? What were the positions at work and how much influence did they have in this situation? Describe both the person being served and those who helped/could have helped.

Conflicts:

What values and expected behaviors impacted the situation, and how did each of the people involved respond to these cultural expectations?

Role and Characteristics of the Servant Leader:

Which characteristics of a servant leader, if any, did you observe in this conversation?

Worksheet D-2: Role Play Observation Sheet

Where in the organization did the servant leader come from? What was his or her title or rank? How did the actions of the servant leader affect others?

What did the servant leader do to help, rather than act from his/her self-interest? If help was offered, how was it received? How productive was the conversation between the servant leader, the person served, and others (if any)?

Did the servant leader admit he or she might not have all the answers? Did it require courage for the servant leader to ask for help, or defend his/her interests? Explain.

Was the servant leader truthful in describing his or her feelings? Did he/she listen willingly and appreciatively to the other person's story? What improvement, if any, did you see in the relationship between this person and the servant leader? Others (if any)?

Did the servant leader (or the person who could have been a servant leader had he or she chosen to do so) offer encouragement and support? How did the colleague respond?

How did the servant leader demonstrate commitment and dependability to the team? Did the colleague trust the words and actions of the servant leader? What evidence did you see of such trust?

What did you see or hear that would indicate a change in the situation? What do you think might happen next?

Worksheet D-3:

Suggestions for Effective Role Plays

Playing a Role:

- Know what role you are playing and the situation.
- Try to respond naturally. Be yourself. At the same time, keep in mind what you know about the character you are playing and how the situation influences your character's actions.
- Don't take notes during the role play. but try to remember what the other participants did that had an impact on you.
- When giving feedback after the role play, be honest but also constructive. Remember, you are not critiquing acting ability but the content of the role play.

Being an Observer:

- Know what roles the participants are playing and the situation.
- Do not speak during the exercise. Just observe.
- Use the Role Play Observation Sheet (worksheet D-2) provided. Take notes during the role play.
- Refer to the observation sheet when giving feedback to the group.
- Try to be objective in your observation and make your feedback positive and constructive.

OPTION 1 (3 HOURS)

Conclusion/Key Take-Aways

(10 minutes)

Objective:

- To provide closure to the program and investigate ways in which concepts presented in *It's A Wonderful Life: Leading Through Service* can be employed in the workplace.

Procedure:

- For this exercise, you will need worksheet B, Key Take-Aways. (See page 32 of this guide.) Make sure you have adequate copies for all participants.
- Say, "Please turn to the Key Take-Aways worksheet in front of you and take two minutes to answer the questions on the sheet."
- When participants have finished, ask them to share their thoughts. If time allows, write these on a blank page of the flipchart.
- (Optional) Schedule a time with participants a month from now to determine what they have changed as a result of this program.
- Thank the participants for coming.

Worksheet B: Key Take-Aways

Objective: To provide closure to the program and investigate ways in which concepts presented in *It's A Wonderful Life: Leading Through Service* can be employed in the workplace.

What key things did you learn about the role and characteristics of the servant leader that you can use in your own job?

What will you do differently because of this program?

What impact do you think becoming a servant leader will have on your life and the lives of those around you?

Option 2: 1.5 Hour Training Program

PROGRAM AGENDA

Time	Description
10 minutes	Introduction
25 minutes	Video Viewing
45 minutes	Group Discussion
10 minutes	Conclusion/Key Take-Aways

OPTION 2 (1.5 HOURS)

Learning Objectives

After completing this session participants will be able to:

- Describe the characteristics of servant leaders and the role servant leaders play in an organization and in the lives of colleagues.
- Compare and contrast their experience with George Bailey's.
- Anticipate some of the obstacles and benefits they may experience as servant leaders in their organization.

OPTION 2 (1.5 HOURS)

Introduction

(10 minutes)

Objective:

- To introduce the **It's A Wonderful Life: Leading Through Service** training program.

Procedure:

- Prepare the room as outlined on pages 8-9 of this guide.
- Welcome participants as they enter.
- Introduce yourself (if necessary).
- **Say, "This one-hour program is designed for a brief but meaningful look at the concept of the servant leader."**

Say, "For some of you, the term may be a new one. You may wonder how a person who is responsible for others can both lead and serve at the same time. The very idea may seem to go against logic and common sense. However, in the video clips of the classic black and white movie, "It's A Wonderful Life," you will see how one person, George Bailey, played by James Stewart, lived his life and managed a business by serving others first."

- Refer to the program agenda you have written on the flipchart and say, "We will begin by watching the video. After that, we will talk about what you have learned and how you can apply that to your job."
- Ask if there are any questions before moving on.

OPTION 2 (1.5 HOURS)

Video Viewing and Group Discussion

(70 minutes)

Objective:

- To view the video and build awareness of the role and characteristics of the servant leader.

Procedure:

- For this exercise, you will need worksheet A, Video Observation Sheet. (See page 38.) Make sure that you have adequate copies for all participants. Do not pass out these sheets until after the video.

- Play the video (prepared according to page 10 of this guide). The video takes approximately 25 minutes.

When the video is finished, pass out the observation sheets. Tell participants to work in pairs and give them 20 minutes to complete the observation sheet.

- When they have finished, begin a group discussion based on the observation sheet questions. Allow 25 minutes for the discussion.
- Using the flipchart, write down participant responses. (See the Key Learning Points on following page for suggestions.) To encourage participation, ask for examples from the participants' own experience, comparing or contrasting it with George Bailey's.
- Ask if there are any questions before moving on.

TIP: If you are having trouble getting responses from the participants, try using the following methods:

- Ask for their opinions.
- Ask open-ended questions and wait patiently for a response.
- Call on people who have not spoken directly.
- Ask for comments on opinions already expressed.
- Compliment and thank those who do contribute.
- Take a break and privately ask those who are particularly quiet if there is a problem.

-Continued-

OPTION2 (1.5 HOURS)

Video Viewing and Group Discussion, cont

Key Learning Points

Servant leaders can come from anywhere in the organization

- Anyone can be a servant leader, regardless of rank or title.
- The power of servant leaders develops from their ability to create trust through meaningful, committed relationships in which we know we can rely on one another.

Servant leaders seek to serve others

- Servant leaders act on a natural human impulse to help others.
- They do not believe that self-interest makes the world go round

Servant leaders recognize when courage is called for

- They are able to admit when they do not know the answer.
- They are not afraid to ask colleagues for help.
- They stand up for someone who is being scapegoated.

Servant leaders speak truthfully

- They are able to tell colleagues what they are experiencing and openly describe what is going on.
- They listen willingly and appreciatively to other's stories.
- They know that speaking truthfully leads us to another level of teamwork and that better relationships and improved productivity will result.

Servant leaders encourage people to live up to their potential

- By providing encouragement and the necessary resources, servant leaders help team members realize their potential in their work and personal lives.
- Persuasion, not coercion, encourages people to help and support others.
- Servant leaders trust the ability of others to come up with solutions that are in their own best interest and the best interests of the organization.

Servant leaders are a colleague others can depend on

- People trust servant leaders - they have demonstrated their dependability and commitment time and time again.
- Our lives develop meaning - and a legacy is created - through small acts that over time make a big difference.

Servant leaders prove that small acts of kindness can have large results

- Small acts of kindness do matter, even in large and seemingly impersonal organizations.
- The way we live our lives, even in the small moments, can create meaningful change.

Worksheet A: Video Observation Sheet

Objective: To record your observations from the video.

Power: How did George's "David" relate to Old Man Potter's "Goliath"? What was the source of George's power?

Service: How did George demonstrate the natural human impulse to serve others? How was his behavior different from Potter's? What examples have you seen in your work or personal life of the impulse to serve others?

Courage: What did George do when he did not have the answer to a problem he was facing? Who were some of the people he defended? What would you have done in George's situation?

Truthfulness: How did George deal with his feelings in his interactions with colleagues and the people of Bedford Falls? How did he respond to their stories and their feelings? What examples did you see of better teamwork and improved relationships as a result of George's behavior?

Encouragement: What did George do to encourage people to live up to their potential? How do you think the people you know might respond to interventions like George's?

Dependability: How did George gain his neighbors' trust? What were some of the ways George demonstrated his commitment to them? What examples of dependability and commitment have you seen in your work or personal life?

Creating change: What acts of kindness helped to create meaningful change in the life of the community of Bedford Falls? What results have you seen in your own life from small acts of kindness?

Think about your organization, department, division, or work team. What could you do as a servant leader in your work setting? What changes do you think might result from serving your co-workers courageously, speaking truthfully, encouraging them to live up to their potential, and proving your dependability through small acts of kindness? What obstacles might you need to anticipate?

OPTION 2 (1.5 HOURS)

Conclusion/Key Take-Aways

(10 minutes)

Objective:

- To provide closure to the program and investigate ways in which concepts presented in *It's A Wonderful Life: Leading Through Service* can be employed in the workplace.

Procedure:

- For this exercise, you will need worksheet B. *Key Take-Aways*. (See page 40 of this guide.) Make sure you have adequate copies for all participants.
- Say, "Please turn to the *Key Take-Aways* worksheet in front of you and take two minutes to answer the questions on the sheet."
- When participants have finished, ask them to share their thoughts. If time allows, write these on a blank page of the flipchart.
- (Optional) Schedule a time a month from now to check with participants to determine what they have changed as a result of this program.
- Thank the participants for coming.

Worksheet B: Key Take-Aways

Objective: To provide closure to the program and investigate ways in which concepts presented in *It's A Wonderful Life: Leading Through Service* can be employed in the workplace.

What key things did you learn about the role and characteristics of the servant leader that you can use in your own job?

What will you do differently because of this program?

What impact do you think becoming a servant leader will have on your life and the lives of those around you?

More About Servant Leadership

(For facilitators who are interested in exploring servant leadership further, these notes and the suggested readings that follow may be helpful.)

Although the concept of servant leadership goes back to the beginning of human history and has been expressed in every major religion and many value systems, it first appeared in leadership literature in 1970, with the publication of *The Servant as Leader* by Robert K. Greenleaf, who wrote. "The servant-leader is servant first. It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. The difference manifests itself in the care taken by the servant - first to make sure that other people's highest priority needs are being served. The best test, and difficult to administer is: do those served grow as persons; do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society; will they benefit, or at least, not be further deprived?"[1]

Greenleaf's was no soft, easy approach. He emphasized autonomy, accountability and self-actualization as well as caring and serving. According to John P. Schuster, co-author of *The Power of Open-Book Management*, "Greenleaf was among the first to raise the bar on the serious discussion of leadership. He, along with John Gardner and James MacGregor Burns, turned the corner for all students of leadership, describing how it is more than skills and situational know-how and is, instead and more fundamentally, a moral contract between leaders and followers to bring out the best in each other for the good the whole."[2]

Steven Covey cites the idea of servant leadership as a "fundamental, timeless principle that will dramatically increase in its relevance. There is a growing awareness and consciousness around it in the world, driven by the global economy, which absolutely insists on quality at low cost. You've got to produce more for less, and with greater speed than you've ever done before. The only way you can do that in a sustained way is through the empowerment of people And the only way you get empowerment is through high-trust cultures and through an empowerment philosophy that turns bosses into servants and coaches."[3]

Ken Melrose, chairman and CEO of The Toro Foundation, a Fortune 500 company, who implemented many organizational developmental changes based on Greenleaf's ideas, writes, "If you want to help create an organization dedicated to caring, valuing, and unleashing the potential of others, you can get started by executing your personal leadership plan. In a servant leadership organization, everyone must act, everyone exerts influence, but if your organization is not there yet, starting the process is key."[4]

After identifying the visionary and implementation aspects of leadership in his Essay, *Servant Leadership Revisited*, Ken Blanchard, writes, "Although emphasis in most servant-leader discussions is on implementation, I think servant leadership involves both a visionary role and an implementation role. Most organizations and managers get in trouble in the implementation phase of the leadership process. While the vision and direction might start with the leader, if you're dealing with experienced people, you want to get them involved in shaping and refining that direction. No matter how the leadership is determined, providing direction is an important part of servant leadership." [5]

In *Stewardship: Choosing Service Over Self-interest*, Peter Block describes process of replacing traditional leadership practices with stewardship - choosing partnership over patriarchy, adventure over safety, and service over self-interest. He writes, "Stewardship depends on a willingness to be accountable for results without using control or caretaking as the means to reach them. This demands a choice for service with partnership and empowerment as basic governance strategies." [6] In his essay, *From Leadership to Citizenship*, he defines citizenship as "our agreement to receive rights and privileges from the community and, in so doing, to pay for them through our willingness to live within certain boundaries and act in the interest of the whole. This requires accountability. Citizenship is accountability that is chosen." [7]

In her essay, *What Is Our Work?* Margaret Wheatley writes, "We can create the lives and organizations we desire only by understanding the enlivening spirit in us that always is seeking to express itself. Servant-leaders help us understand ourselves differently by the way they lead. They trust our humanness; they welcome the surprises we bring to them; they are curious about our differences; they delight in our inventiveness. They trust that we can create wisely and well, that we seek the best interests of our organization and our community, that we want to bring more good into the world." [8]

These are but a few of the current views on servant leadership. The topic has generated considerable discussion and there are numerous examples of putting servant leadership into practice in business, educational, and religious organizations.

[1] Greenleaf, Robert K. *The Servant as Leader*: Robert K. Greenleaf Center for Servant Leadership, 1970, 1991

[2] Schuster, John P., "Servants, Egos, and Shoeshines: A World of Sacramental Possibility," in *Insights on Leadership*, edited by Larry C. Spears: John Wiley & Sons, 1998.

[3] Covey, Steven. "Servant Leadership from the Inside Out," Foreword, *Insights on Leadership*, edited by Larry C. Spears: John Wiley & Sons, 1998.

[4] Melrose, Ken. "Putting Servant leadership into Practice," in *Insights on Leadership*, edited by Larry C. Spears, John Wiley & Sons, 1998.

[5] Blanchard, Ken. "Servant leadership Revisited," in *Insights on Leadership*, edited by Larry C. Spears: John Wiley & Sons, 1998.

[6] Block, Peter. *Stewardship: Choosing Service Over Self-interest*. Berrett-Koehler Publishers, 1993, 1996.

[7] Block, Peter, "From leadership to Citizenship," in *Insights on Leadership*, edited by Larry C. Spears: John Wiley & Sons, 1998.

[8] Wheatley, Margaret J. "What Is Our Work?" in *Insights on Leadership*, edited by Larry C. Spears: John W Sons, 1998.

Suggested Reading

The Fifth Discipline by Peter M. Senge: Doubleday/Currency, 1990.

Insights on Leadership, Larry C. Spears, ed.: John Wiley & Sons, Inc. 1998.

The Leader of the Future, France Hesselbein, et al, eds. The Drucker Foundation Future Series: Jossey-Bass, 1996.

Leadership and the New Science, by Margaret J. Wheatley: Berrett-Koehler 2nd edition. 1999.

On Becoming a Servant-Leader, Robert K. Greenleaf. Don M. Frick and Larry Spears, eds.; Jossey-Bass, 1996.

Stewardship by Peter Block: Berrett-Koehler, 1996.

A Simpler Way, by Margaret J. Wheatley and Myron Kellner-Rogers Berrett-Koehler, 1996.