

# New Leadership

*Helping clients improve personal organisation, team-working and corporate governance*

## Background information booklet

Version: 2.4

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# 1. Introductory overviews

## 1.1 Profile of New Leadership Ltd

### **Purpose**

New Leadership Ltd is a small training and consultancy firm currently operating in the UK, USA and Rwanda. Based on the work of Jonathan Wolf-Phillips in education and business in the UK and Europe for over 20 years, the company's core task is **to help organisations improve their overall effectiveness**. We do this by helping our clients to significantly and sustainably improve the productivity, accountability and well-being of individuals and teams throughout their organisation. We do this by taking a competency-based capacity-building approach to empowering people at all levels of the organisation. This enables them to more effectively organise themselves, collaborate in a team, and contribute to overall good governance. We call our distinctive approach 'Associative Leadership'.

### **Programmes**

#### Personal Effectiveness (1-to-1 training and coaching)

**Time-management** - Spend most of your time on what matters to you most (create your own new system using materials provided).

**Workflow** - File or find anything, quickly and easily (paper-based and/or computer-based, starter kit of paper workflow materials provided).

#### Personal Development (1-to-1 training and coaching)

**Long-term intentions** - Identify key areas of focus and develop overall intentions for each.

**Personal ethos** - Clarify what matters most through self-directed structured reflection on your past, present and future.

#### Organisational Effectiveness (a combination of 1-to-1 and group training and coaching)

**Meetings** - Clear agendas and effective facilitation which encourages good participation and productive use of time.

**Decisions** - Clear and sustainable decisions in realistic timescales using the most effective method for the situation.

**Planning** - A method that enables groups/individuals to balance short-term operations with long-term development.

#### Organisational Development (a combination 1-to-1 and group training and coaching)

**Corporate ethos** - Corporate history, stakeholder interests, core task, core values, long-term vision, overall strategy.

**Corporate constitution** - Aligning approach to accountability, planning and decision-making with corporate ethos.

**Corporate plan** - Aligning group/individual implementation plans with corporate ethos and corporate constitution.

## Distinctiveness

- All our programmes produce **specific, swift and measurable outcomes** (which can be linked to key performance indicators clients may already be using).
- Our methodology-based approach ensures that these **outcomes are sustainable**. All our programmes are **delivered by the developer** of the integrated competency framework and theory that underpins all the programmes.
- Our Personal Effectiveness Programme is based on the only **5<sup>th</sup> generation time-management system and 2<sup>nd</sup> generation workflow system** currently available.
- Our approach is particularly well suited to organisations wishing to work with a more **collaborative approach to leadership** and/or a more **distributed approach to accountability** (e.g. commercial partnerships, the creative industries, government departments, social enterprises, charities, non-governmental organisations, educational/research organisations).

## Specialist applications

- Helping **human resource departments** develop integrated and effective performance management systems
- Helping **sales teams** improve sales effectiveness by improving personal organisation and teamwork
- Helping **software development teams** improve productivity by improving creativity and collaboration
- Helping **leadership teams** align stakeholder interests, corporate ethos, accountability structures and overall plans
- Helping **individuals** from a variety of settings prepare for and/or navigate through times of change/transition
- Helping **teachers** improve the employability skills of young people (including those in secure settings)
- Helping **teachers** improve the personal organisation skills of young people (including those living with dyslexia and dyscalculia)
- Helping **psychologists** develop mental health programmes (based on personal effectiveness and personal development programmes).

## 1.2 Development of the work of Jonathan Wolf-Phillips

### Phases and milestones

|   |  |
|---|--|
| <p><b>1981 – 1984</b></p> <p><u>Original impulse for work</u></p> <p>Identified need for <b>improved school leadership</b></p>                          | <p><b>Original need identified</b> during final three years at an independent school in the UK. The overall need was for a way of working based on ‘Grounded Idealism’.</p> <p>The specific need identified was for training that helped enable staff, governors and parents to work together to run early years centres and schools as <b>modern and effective learning organisations</b> based on <b>shared leadership</b> and <b>consensus-based decision-making</b>; with <b>self-development based on reflective practice</b> at the heart of professional development.</p> |
| <p><b>1984 – 1993</b></p> <p><u>Vision 1</u></p> <p><b>Develop skills</b> in marketing and organisational development by working in industry</p>        | <p>1984 to 1986 – School teachers and education advisors - Freelance Trainer (PC software)<br/> 1986 to 1987 – Philips optical disc storage consultancy - Marketing Assistant (Norway)<br/> 1987 to 1988 – IBM systems consultancy - Marketing Executive (UK)<br/> 1988 to 1993 – HP telecommunications software developer - Marketing Manager (UK) then European Marketing Communications Manager (based in Holland and then Belgium)</p>   |
| <p><b>1993 – 2006</b></p> <p><u>Vision 2</u></p> <p><b>Develop training</b> for individuals and groups, based on an integrated competency framework</p> | <p>1993 – Started working freelance in education sector (early years centres and schools)<br/> 1995 – Started working on theoretical underpinning of work (‘Grounded Idealism’)<br/> 1999 – Set up non-affiliated private company to develop the work (New Leadership Ltd)</p> <p>2003 – Started using ‘Associative Leadership’ to describe the competency framework<br/> – Work evaluated by leadership expert (Professor Philip Woods, University of Gloucestershire, UK)<br/> – Started working with young people in school settings</p>                                      |
| <p><b>2006 – 2008</b></p> <p><u>New impulse for work</u></p> <p>Identified need for <b>enhanced leadership forms</b> in wider society</p>               | <p>2006 – <b>Broader need identified</b> during desk research (need was for enhanced forms of leadership)<br/> – Updated theoretical underpinning<br/> – Co-authored paper on ‘Scientific Citizenship’ (published in ‘Trends In Biotechnology’ journal)</p> <p>2007 – Updated all teaching and learning materials with broader need in mind</p>  |
| <p><b>2008 – 2020</b></p> <p><u>Vision 3</u></p> <p><b>Widespread application</b> of Associative Leadership</p>   | <p>2008 – Started offering integrated internet-based tools to help sustain competencies<br/> – Started working with young people in secure settings</p> <p>2009 – Started working in USA<br/> – Started “due diligence” process in relation to working in Rwanda</p> <p>2011 – Started developing strategic partnerships in UK, USA and Rwanda.<br/> – First asked to be a judge for the Africa Innovation Prize</p>   |

## 1.3 Development of New Leadership's work in Rwanda

### “Due diligence” process

Starting 2009, Jonathan Wolf-Phillips made a number of visits to Rwanda. The purpose of the visits was to meet with people from a variety of sectors, to identify any human capital development needs in the country that might be addressed by the training and development programmes offered by New Leadership Ltd (a small training and consultancy firm set up in 1999, with clients in the UK and USA).

In August 2011, following detailed discussions and the completion of a number of exploratory projects, Jonathan decided to make a substantial and long-term commitment to Rwanda by establishing a Rwandan subsidiary of New Leadership Ltd (called ‘The Kigali Centre for Associative Leadership’), to take on further projects and to begin work on developing a Rwandan delivery team.

### The purpose of New Leadership's work in Rwanda

Rwanda's overall development goal is to move, in a single generation, from one of the poorest countries in the world (and the location in 1994 of a genocide in which almost one million people lost their lives in around 100 days), to being a middle-income nation built on a knowledge-based economy and some of the most progressive social, environmental and economic policies anywhere in the world.

If Rwanda were to achieve this goal (and the likes of The World Bank and The International Monetary Fund think that it will), it would be the only country anywhere in the world ever to have done so.

### The Kigali Centre for Associative Leadership

The Rwandan subsidiary of New Leadership Ltd is licensed to use Jonathan's intellectual property to help Rwandans to develop and enhance some of the key skills they will need to create and grow the country's institutions and economy, enabling the country to meet its key development goal (as detailed in the Rwandan government's ‘Vision 2020’ document and guided by the country's constitution).

The purpose of The Kigali Centre for Associative Leadership (KCAL) is to enable organisations in all sectors of Rwandan society to improve their overall effectiveness. It is envisaged that, although closely supported by Jonathan and other individuals and organisations from outside Rwanda with goodwill towards the country, KCAL will work towards being run primarily by and for Rwandans.

## 2. Programme learning objectives

### 2.1 Personal Effectiveness Programme (1-to-1)

| Description   | Learning outcomes   |
|---|---|
| <p style="text-align: center;"><b><u>Time-management</u></b></p> <p style="text-align: center;"><b>Quickly and easily organise yourself and your time, while still remaining flexible.</b></p> <p>A simple, powerful and practical methodology that is easy to learn, use and sustain – both at work and at home.</p> <p>Suitable for a wide variety of personality types and learning styles.</p> <p>Clear separation between information, intentions and tasks. Integrates with a variety of computer-based task management and shared diary systems.</p> <p>Based on a specially designed and easy to use paper-based compact binder and appointments diary. The binder is used in combination with a few simple techniques. These techniques take only a few minutes to learn and are easy to apply.</p> <p>The sessions focus on you using these techniques to create and start using your own simple, practical and effective time-management system, that meets your particular needs in your current circumstances and ways of living and working.</p> <p><i>1 day needed to set up and start using the system.</i></p> | <p style="text-align: center;"><b><u>Time-management</u></b></p> <p style="text-align: center;"><b>Spend most of your time on what matters to you most.</b></p> <p>The system you create for yourself will take into consideration both your work and non-work priorities and commitments.</p> <p>The system will enable you to remain flexible and spontaneous in the moment about how to use your time.</p> <p>The system you create for yourself will also enable you to combine:</p> <ul style="list-style-type: none"> <li>i) dealing with <u>un-expected tasks</u>, as they arise</li> <li>ii) doing short-term <u>planned tasks</u></li> <li>iii) working towards fulfilling any medium or long-term <u>intentions</u> that you may have.</li> </ul>   |
| <p style="text-align: center;"><b><u>Workflow</u></b></p> <p style="text-align: center;"><b>Create your own practical workflow and information system.</b></p> <p>Simple and powerful paper-handling and filing system methodology that is easy to learn, use and sustain – both at work and at home.</p> <p>Uses inexpensive and environmentally responsible materials.</p> <p>Able to deal with a large number of files and a high level of complexity.</p> <p>Integrates your paper-based system with any PC-based email, filing or voice-mail systems (mobile, other), as well as any other computer-based workflow application.</p> <p><i>Up to 2 days needed to set up and start using the paper-based and computer-based systems.</i></p>  | <p style="text-align: center;"><b><u>Workflow</u></b></p> <p style="text-align: center;"><b>File or find anything, quickly and easily.</b></p> <p>The filing materials are used with a few simple techniques, which take only a few minutes to learn. This means the sessions focus on you using the techniques to create a way of handling and storing paper that meets your particular needs, and takes into consideration your current circumstances and ways of living and working.</p> <p>A similar approach is then used to set up your computer-based filing system (e.g. documents, media files, emails, voice mails, texts).</p> <p>Because the paper and computer systems use a uniform approach, they are able to work together smoothly, side-by-side, which improves overall productivity.</p> <p>Once you have created your system, you will be able to find or file anything in your integrated paper-based and computer-based system within 15 seconds; and make it easier for others to do so too.</p> |

All sessions are 1-to-1 and progress at a pace that best suits the way that you learn. The tools are easy to learn and apply. They consistently produce significant, measurable, sustainable results, quickly, in a variety of settings. The training is compatible with a variety of learning styles and personality types and is suitable for people of all ages. The personal time-management and workflow systems that are created during the training can easily link with other systems (paper/computer). They are also highly integrated so that paper and computer-based files or emails can easily be linked with one or more associated tasks. If the time-management and workflow tools are combined with the outcome of a retreat, day-to-day decisions can be made in the context of what matters most to a person over the longer term.

## 2.2 Personal Development Programme (1-to-1)

| Description   | Learning outcomes  |
|---|--|
| <p style="text-align: center;"><b><u>1-day retreat</u></b></p> <p style="text-align: center;"><b>Learn how to develop your intentions, in the areas of your life that matter most to you.</b></p> <p>This 1-day 1-to-1 facilitated retreat uses a specially designed methodology to clarify short, medium and long-term intentions.</p> <p>The methodology is compatible with a wide variety of approaches to personal development and fully integrates with the Personal Effectiveness Training.</p>   | <p style="text-align: center;"><b><u>1-day retreat</u></b></p> <p>The session starts with you identifying particular areas of focus or responsibility in your life (past, present and future).</p> <p>You will then learn and start to use a simple technique for clarifying intentions. You will then be able to use the technique yourself during the session to create an intention for one or more of the areas that you identified; using whatever level of detail and timescale is most useful to you.</p> <p>After the session, you will be able to continue to use the technique that you learned in a way that suits you best.</p>  |
| <p style="text-align: center;"><b><u>Multiple-day retreat</u></b></p> <p style="text-align: center;"><b>A self-directed structured autobiographical reflection process, supported by a facilitator.</b></p> <p>The multiple-day Personal Retreat process can be used in combination with the Personal Effectiveness training.</p> <p>If used in this way, you will be able to remain aware (on a day-to-day basis) of what you remember mattering most to you in the past, as well as what you would like to remember matters most to you now and in the future.</p> <p>No prior knowledge of personal development or any other subject is needed.</p> <p>No preparation or additional work is required before, during or after the 1-day sessions.</p> | <p style="text-align: center;"><b><u>Multiple-day retreat</u></b></p> <p style="text-align: center;"><b>Learn how to remain aware of what matters most to you about your past, present and future.</b></p> <p>The multiple-day Personal Retreat process has been used over many years by people of differing ages in a variety of settings (testimonials available).</p> <p>The following benefits have been consistently identified:</p> <ol style="list-style-type: none"> <li>i) better prepared for a major life decision</li> <li>ii) increased clarity about or motivation for an existing or new personal direction</li> <li>iii) increased clarity about or motivation for an existing or new work direction</li> <li>iv) improved ability to prioritise how to use time and energy</li> </ol> |

**Distinctiveness:** All sessions are 1-to-1 and so can progress at a pace that best suits you and the way that you learn. The process is compatible with a wide variety of learning styles, personality types and world-views. The process is suitable for people of any age. The process is based on a multi-disciplinary theoretical framework, which is continually refined specifically to support the development and application of the process.

## 2.3 Organisational Effectiveness Programme

| Description                          | Learning outcomes   |
|--------------------------------------|---|
| <p><b><u>Meetings</u></b></p>        | <p>How to create clear, realistic and flexible meeting agendas.</p> <p>How to maintain the effectiveness and flexibility of a meeting by intervening with integrity.</p> <p>How to create effective minutes that are approved as the meeting progresses, so that they can be agreed and distributed straight after the meeting, if required.</p>  |
| <p><b><u>Decision-making</u></b></p> | <p>How to choose the best decision-making tool for a particular situation (e.g. individual/group, voting/consensus).</p> <p>How to make clear decisions based on consensus in realistic timescales, allowing for a wide range of views and levels of support to be expressed and included.</p>  |
| <p><b><u>Planning</u></b></p>        | <p>How to create aligned individual and group work plans (i.e. that include a long-term development intention for the group, based on the organisation's vision), as well as detailed plans for the year ahead.</p> <p>How to work with Corporate Management to integrate all the work plans into an overall Corporate Plan.</p> <p>How to work with Corporate Management to help them monitor and support day-to-day activities by using agendas, proposals and minutes from groups, in the context of the Corporate Plan.</p> |

## 2.4 Organisational Development Programme

| Description                                 | Learning outcomes   |
|---|---|
| <p><b><u>Corporate Constitution</u></b></p> | <p>How to <b>create/update a Corporate Constitution</b> that:</p> <ul style="list-style-type: none"> <li>- is underpinned by the organisation's legal constitution;</li> <li>- reflects the organisation's distinctive ethos;</li> <li>- outlines the organisation's overall approach to accountability, planning, decision-making and handling concerns.</li> </ul> <p>How to <b>monitor and support accountability throughout the organisation</b>, in the context of the Corporate Constitution.</p>                 |
| <p><b><u>Corporate Ethos</u></b></p>        | <p>How to <b>create/update a Statement of ethos</b> that includes:</p> <ul style="list-style-type: none"> <li>- the organisation's history (biography);</li> <li>- the interests of current primary and secondary stakeholders;</li> <li>- the organisation's core task, core values and overall long-term vision.</li> </ul>   |
| <p><b><u>Corporate Plan</u></b></p>         | <p>How to support <b>aligned individual and group work plans</b> (i.e. that include a long-term development intention for the group, based on the organisation's vision), as well as detailed plans for the year ahead.</p> <p>How to integrate all the work plans into an overall <b>Corporate Plan</b>.</p> <p>How to <b>work with individuals and working groups</b> to <b>monitor and support day-to-day activities</b> using agendas, proposals and minutes from groups, in the context of the Corporate Plan.</p> |

## **3. Specialist applications**

### 3.1 Integrated Performance Management System (IPMS)

The purpose of the **Integrated Performance Management System** is to significantly and sustainably improve the productivity, accountability and well-being of individuals and teams throughout an organisation.

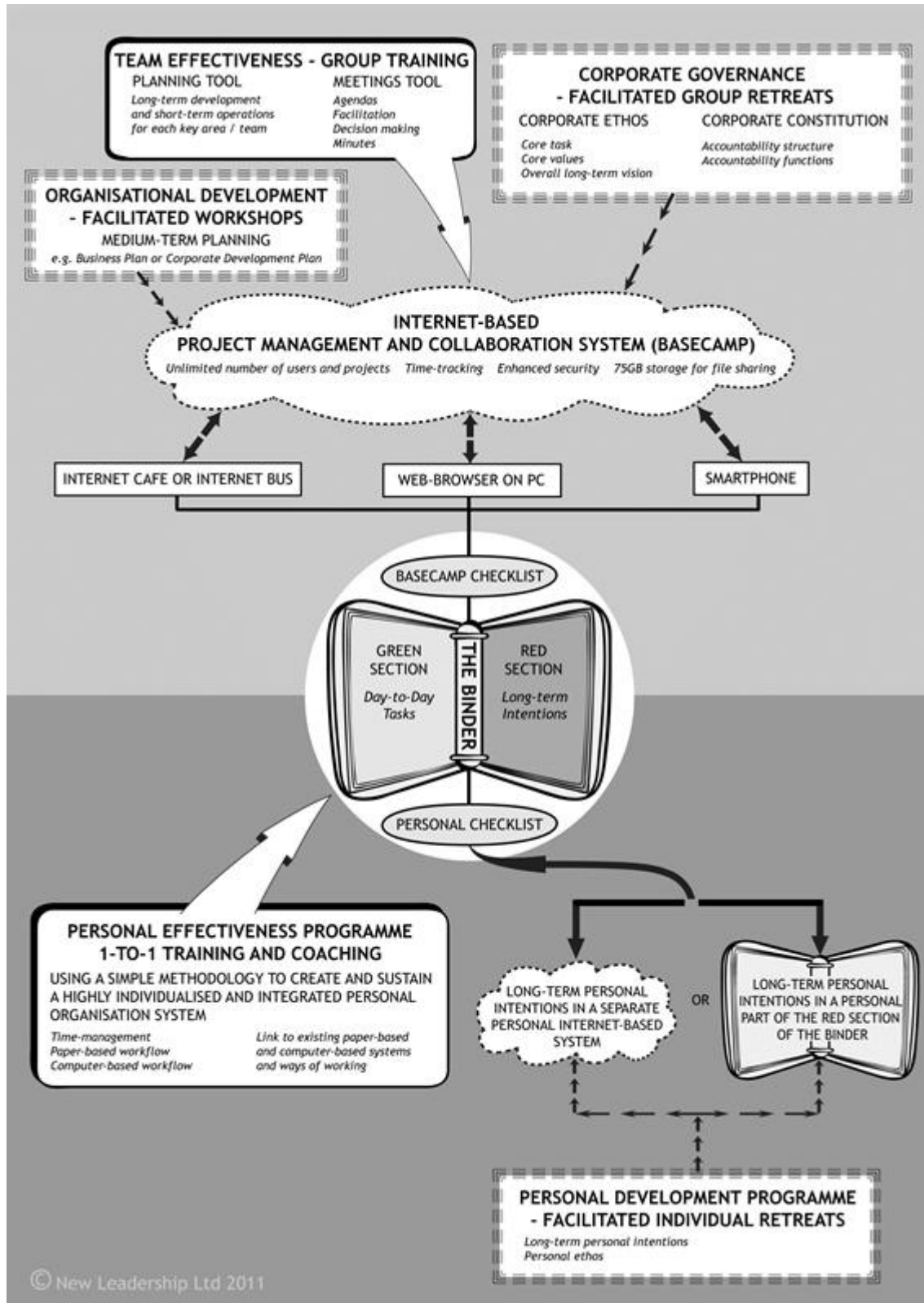
Implementing the IPMS involves taking a competency-based capacity-building approach to empowering people at all levels of an organisation.

The specific core competencies that are developed are:

- **personal organisation** (using a unique methodology and compact carry-around binder);
- **team-working** (using a specially designed planning methodology that fully integrates with both the personal organisation binder and a web-based collaboration tool);
- contributing to overall good **corporate governance** (using an innovative approach to developing and sustaining clearly defined decision-making and accountability structures).

# Integrated Performance Management System (IPMS)

## Information flow



The top half of the diagram represents the collective (i.e. groups and the organisation as a whole).

The bottom half of the diagram represents the individual.

The Binder acts a “bridge” between the two.

# Integrated Performance Management System

## Planning Methodology

| <b>Level</b><br>(based on the IIAgmi algorithm) * | <b>Timescale</b>  | <b>Output document</b>  | <b>Tools</b>  | <b>Update frequency</b>                               |
|---|---|---|---|---|
| <i>Impulse &amp; Intention</i>                    | <b>Long-term</b><br>5+ years  | <b><u>Corporate Ethos</u></b><br>Corporate biography/history<br>primary and secondary stakeholders<br>core task, core values (impulse)<br>long-term vision (intention).         | A licensed <b>facilitator</b><br>using a structured <b>“ethos” process</b><br>(1-to-1 and/or group)   | As and when necessary.<br>Full review every 7 years.  |
| <i>Governance</i>                                 |   | <b><u>Corporate constitution</u></b><br>Overall approach to accountability,<br>planning and decision-making   | A licensed <b>facilitator</b><br>using a structured <b>“constitution” process</b><br>(1-to-1 and/or group)  | As and when necessary.<br>Full review every 3 years   |
| <i>Management</i>                                 | <b>Medium-term</b><br>(1 to 3 years -<br>a “bridge” between<br>short-term &<br>long-term) | <b><u>Corporate Development Plan and Financial Plan</u></b> as separate documents,<br>or a <b><u>Business Plan</u></b> that includes a<br>Financial Plan as one of its sections | A <b>facilitator and professional advisers</b> ,<br>using a proven <b>business planning methodology</b><br>either in a PC (stand-alone) or an internet-based<br>(collaborative) environment | As and when necessary.<br>Full review every year      |
| <i>Implementation</i>                             | <b>Short-term</b><br>(day, week, month)   | <b><u>Implementation Plan for teams</u></b><br>Projects & activities  | A collaborative <b>internet-based</b> project &<br>activities management system (Basecamp)  | On-going, using “Preview”<br>methodology (checklists) |
|   |   | <b><u>Implementation Plan for individuals</u></b><br>Tasks & appointments   | A <b>paper-based</b> task & time management<br>system (in compact carry around binder)  | On-going, using “Preview”<br>methodology (checklists) |

\* The ‘IIAgmi algorithm’ is a powerful, easy-to-learn and widely applicable thinking practice. It is based on a combination of Socratic Logic, Network Logic, and Type Theory.

Using it helps people to be as clear as they can about and then remain aware of: the **I**mpulse behind an intention (i.e. stimulus to action) an **I**ntention (i.e. purpose of action) and how to effectively fulfil an intention through **A**ction, in three distinct areas:

**g**overnance – Clarifying and upholding the impulse (e.g. maintaining an awareness of overall expectations and underlying principles),

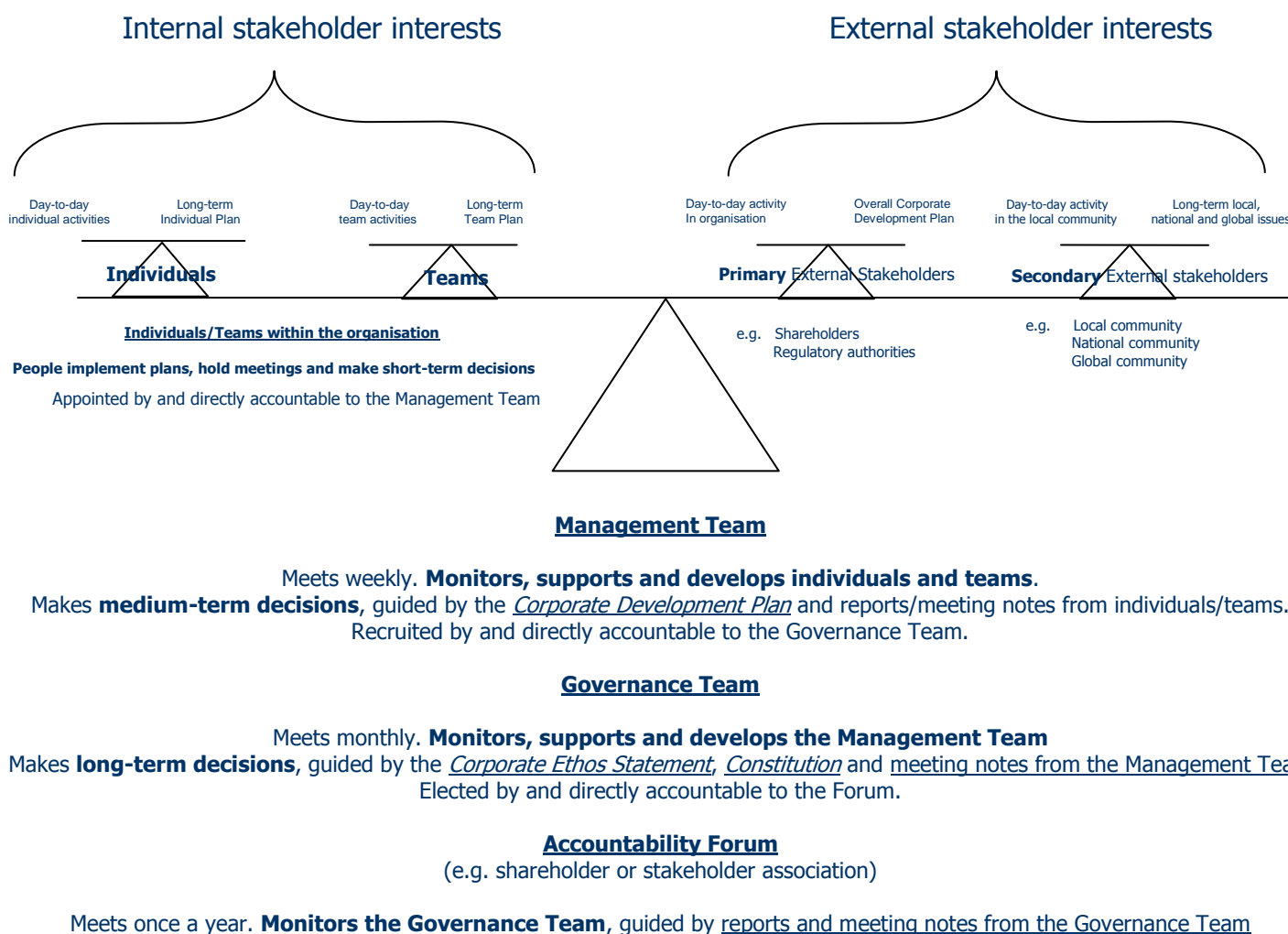
**m**anagement – Allocating and coordinating resources (e.g. natural, human, manufactured, financial), and

**i**mplementation – Doing specific tasks and activities (e.g. putting plans into practice, doing tasks and activities as they come up).

For further details, please see the document that outlines the theoretical framework that underpins all of New Leadership’s work.

# Integrated Performance Management System (IPMS)

## Example accountability structure



## 3.2 Improving the effectiveness of salespeople

New Leadership's distinctive approach comprises a customised and integrated programme of 1-to-1 and group training for individual salespeople, sales teams, and sales managers.

### Particular needs of salespeople

Ability to plan, organise and prioritise, whilst remaining flexible throughout the day, week and month. Ability to respond to unpredictable requests of customers and management. Wide range of administration tasks, which must be planned and completed in order to maximise time in front of customers and ensure high levels of service and productivity. Traditional work-based diary planning systems do not take into account a salesperson's need for work/life balance and long-term personal and career intentions.

### Overall benefits of New Leadership's approach

**Easy and quick to deploy** – A three-day one-to-one programme that rapidly improves and then sustains the personal effectiveness of salespeople

**Increased profit** – More profit generated by fewer people in harder economic times

**Increased staff retention and morale** – More people retained, and those people happier and more effective

**Clear return on investment** – Field sales = 60 days (actual figures from recent case study). Corporate sales = 14 days (estimate based on recent case study)

**Low risk** – A proven approach (developed over 20 years, used in a variety of settings)

**Innovative** – Training based on only available 5th generation time-management system.

### Benefits of New Leadership's approach to improving personal effectiveness

All sessions are **1-to-1** and progress at a pace that best suits the way that a person learns.

The tools are **very easy to learn and apply**, and have consistently produced significant, measurable, sustainable results, quickly, in a variety of settings.

The training is **compatible with a variety of learning styles and personality types** and is suitable for people of all ages.

The personal time-management and workflow systems that are created during the training sessions can **easily link with other systems** (either paper and/or computer-based).

**No change is needed** to existing paper-based or computer-based sales management and customer relationship management systems.

Systems created are **highly integrated** so that paper and computer-based files or emails can easily be linked with one or more associated tasks.

### 3.3 Improving the employability of young people

Our distinctive approach comprises a customised programme of consultancy and training for **curriculum designers and teachers** wishing to embed one or more of our competencies into their programmes.

One or more of the modules can be taught in any order; either separately or embedded in existing schemes of work; or included in existing or new work with any type of Class or Student Council/Association. For example, the personal time-management and workflow training could be offered to students preparing for exams or to students with identified special educational needs (where it has been shown to be helpful both practically and in terms of raising and sustaining self-esteem).

A current widely used approach to Student Councils is called ‘Student Voice’. This approach is primarily ‘rights-based’ (article 12 of the United Nations Convention on the Rights of the Child), and is where staff involve students in staff work/decisions, and accountability is based on a traditional (‘linear’) hierarchy.

Our distinctive approach to Class and Student Associations builds on the Student Voice approach and **additionally enables students to involve staff in their work/decisions** as well. High levels of genuine student freedom and responsibility are enabled and sustained by:

- Separation of powers (Ownership, Governance, Management, Implementation)
- Separation of stakeholders (internal/external, primary/secondary)
- Separation of interests (Rights, Needs, Intentions)
- Accountability based on either a linear or non-linear hierarchy (i.e. ‘holarchy’)
- Overall structure based on a democracy (‘Evolutionary Constitutional Representative’)
- Clear, strong and fair boundaries between roles of staff and students

Students are provided with specialist training which enables them to **work independently** (either alone and/or in a team) and **be accountable; drawing on assistance** from staff and others as necessary. A Student Association can be both independent and integral to the life of the setting. In secondary and tertiary education settings, every student involved is considered a member of a Student Association. Teams are **self-managed and self-selecting** (across age and ability ranges). The structure of a Student Association using our approach allows for an **unlimited number of members**. Class Associations in primary schools can be preparation for Student Associations in secondary or tertiary settings (comprising an unlimited number of self-managing teams).

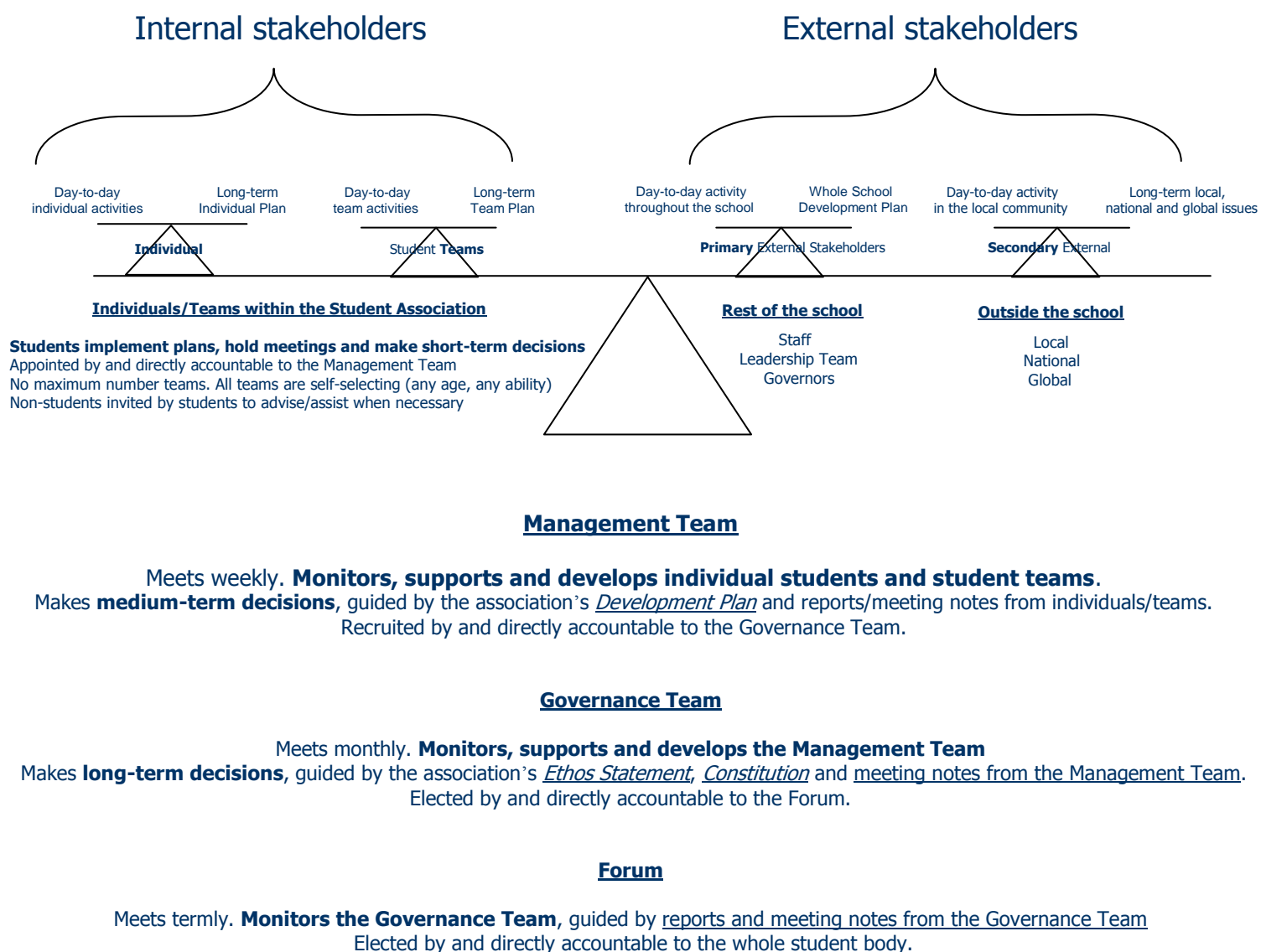
Using this approach enables students to experience and learn from **high levels of responsibility and accountability** within a genuine **integrated governance, management and democratic structure**.

When applied in full, this distinctive approach enables young people to learn from actual experience in their current place of study about how to work with an organisation’s internal and external stakeholders to develop an integrated approach to **sustaining high levels of economic performance, social responsibility and environmental protection**.

This experience of ‘Corporate Citizenship’ and the practical skills that they will have learned can then be used later in both their personal lives and in their place of work or further study.

## Example structure of a Learner Association

created and implemented using Associative Leadership approach



## **4. Distinctiveness of the Personal Effectiveness Programme**

### 4.1 Comparison with Stephen R. Covey's work

The purpose of New Leadership's personal effectiveness programme (PEP) is to increase personal effectiveness.

There are many approaches to increasing personal effectiveness in the marketplace today. A well-known approach is the work of Stephen Covey. There are some similarities between Covey's '7 Habits of highly effective people' (and many less well-known approaches) and New Leadership's 'Personal Effectiveness' work. And there are also some important differences.

The similarity is that the goal of New Leadership's PEP and the other approaches is to help people learn how to be more effective. The major difference is that Covey – in particular – takes a **knowledge-based** approach to developing character, and New Leadership takes a **competency-based** approach to developing very specific skills. This means that both approaches could be used by the same organisation.

Some years ago, Stephen Covey developed a time-management system based on his 'Habit 3' (called 'First Things First'), and this is now available from The Franklin-Covey Organisation (<http://www.franklincovey.com/>). For a detailed analysis of the difference between Franklin-Covey's "4th generation" approach to time management and New Leadership's "5th generation" approach, please see the 1-page comparison document. Another difference between New Leadership's solution and Covey's work is that New Leadership's PEP can be part of a tightly integrated competency framework, that also covers teams and the whole organisation. If required, this can be underpinned by an internet/cloud-based project-management and collaboration system called 'Basecamp' (<http://basecampHQ.com/>).

The current leading supplier of workflow training in the marketplace is The David Allen Company, based in the USA (<http://www.davidco.com/>). The difference between David Allen's "1st generation" workflow system and New Leadership's "2nd generation" approach is outlined in the 1-page comparison document.

In short, the difference between New Leadership's Personal Effectiveness Programme and what is available elsewhere is that our solution is based on the **only "5th generation" time-management system** and the **only "2nd generation" workflow system** currently available.

The distinctive approach underpinning New Leadership's Personal Effectiveness Programme is copyrighted and is not available from any other source. Furthermore, the company takes a robust approach to protecting the intellectual property upon which all its work is based.

## 4.2 Comparison with other approaches

(Each generation builds on strengths and reduces weaknesses of previous generations)

### Time-management systems

#### ***1st generation***

Memory-based: Remember tasks/appointments.

#### ***2nd generation***

Add written lists and diary. Planning based on lists (e.g. Filofax, Day-Timer, Personal Digital Assistants)

#### ***3rd generation***

Adds goals and key areas. Short and long-term prioritizing based on daily, weekly, monthly and annual planning. Uses a dedicated paper-based system. ('Time Manager' from TMI)

#### ***4th generation***

Adds values and roles. Uses goals, roles and values, combined with a specific 7-day planning methodology ('First things first' from Franklin-Covey)

#### ***5th generation (our offering)***

**Very easy to learn, use and sustain.** Uses simple methodology. Suitable for any personality type and learning style. Clear separation between information, intentions and tasks. Easily integrates with a variety of computer applications (including MS Outlook and other shared diary and task management systems). Successfully addresses problem of "Continuous Partial Attention". Option to add 'sense of self' (using 'Personal Ethos Process').

### Workflow systems

#### ***1st generation***

Paper-handling using folders and trays. (TMI 'Personal Organisation', David Allen Company 'Getting Things Done')

#### ***2nd generation (our offering)***

Very simple paper-handling and filing system methodology using inexpensive materials. Able to deal with a large number of files and a very high level of complexity. Very easy to learn, use and sustain. Suitable for any personality type and learning style. Integrates with any PC-based email, filing and voice-mail systems (mobile, other), as well as other computer-based workflow applications. Fully integrates with and supports our time-management system. **Find or file anything in your system (whatever the size) within 15 seconds** (paper or computer-based), and make it easier for others to do so as well.

## 5. Overview of theoretical framework

### 5.1 Competencies

*(Italic text = An optional integrated internet-based application, accessed via any web-browser or a dedicated Smartphone application.)*

| Competencies for individuals   | Competencies for teams/organisations/communities   |
|--|--|
| <p style="text-align: center;"><b>Personal Organisation</b></p> <p style="text-align: center;">Developing and sustaining day-to-day personal effectiveness</p> <ul style="list-style-type: none"> <li>- Time-management (including compact binder, small wallet &amp; checklists)</li> <li>- Paper-based workflow (including paper-handling tools &amp; checklist)</li> <li>- Computer-based workflow (including configuration &amp; checklist)</li> <li>- <i>Using Basecamp project management system (web &amp; smartphone)</i></li> </ul>             | <p style="text-align: center;"><b>Team-working</b></p> <p style="text-align: center;">Developing and sustaining day-to-day group effectiveness</p> <ul style="list-style-type: none"> <li>- Effective and collaborative meetings (agendas, facilitation, minutes)</li> <li>- Collaborative decision-making (including 'Gradient of support' tool)</li> <li>- <i>Collaborative planning &amp; project management using Basecamp</i></li> </ul>  |
| <p style="text-align: center;"><b>Personal Development</b></p> <p style="text-align: center;">Clarifying and remaining aware of long-term intentions</p> <ul style="list-style-type: none"> <li>- Initial 1-to-1 sessions (includes checklist to link to time management)</li> <li>- Quarterly review (alone or 1-to-1 facilitated)</li> <li>- Annual review (alone or 1-to-1 facilitated)</li> <li>- Levels of intention (governance, management, implementation)</li> <li>- <i>Using Basecamp to store and update individual intentions</i></li> </ul> | <p style="text-align: center;"><b>Team Management</b></p> <p style="text-align: center;">Clarifying and remaining aware of long-term group intentions</p> <ul style="list-style-type: none"> <li>- Primary stakeholder analysis (primary internal/external for the group)</li> <li>- Stakeholder engagement (accountable with, help, advice, consult, referendum/poll, inform)</li> <li>- Long-term development intention (linked to organisation's vision)</li> <li>- Key areas of activity (day-to-day operations and development work)</li> <li>- Group's accountability structure (linear hierarchy, holarchy, heterarchy)</li> <li>- Criteria for evaluating effectiveness (internal and external)</li> <li>- Resources (human, other)</li> <li>- Policies and procedures (within group, across whole organisation)</li> <li>- Milestones (day-to-day operations and development work)</li> <li>- Budgeting (income/expenditure, essential/necessary)</li> <li>- Decision-making (individuals, team as a whole, others; voting or consensus)</li> <li>- <i>Using Basecamp to support Corporate Management</i></li> </ul>  |
| <p style="text-align: center;"><b>Personal Development</b></p> <p style="text-align: center;">Clarifying and remaining aware of personal ethos</p> <ul style="list-style-type: none"> <li>- Initial 1-to-1 sessions (includes checklist to link with time management)</li> <li>- Personal ethos review (e.g. every year; alone or 1-to-1 facilitated)</li> <li>- Personal ethos refresh (e.g. every 7 years; alone or 1-to-1 facilitated)</li> <li>- <i>Using Basecamp to store and update personal ethos</i></li> </ul>                                 | <p style="text-align: center;"><b>Corporate Governance</b></p> <p style="text-align: center;">Clarifying and remaining aware of organisational ethos</p> <ul style="list-style-type: none"> <li>- Biography of organisation (turning points &amp; development phases)</li> <li>- Stakeholder type (past/current/future, internal/external, primary/secondary)</li> <li>- Stakeholder interests (rights, needs, intentions; vested/non-vested; short/long-term)</li> <li>- Expressing interests as intentions (impulse, intention, action)</li> <li>- Core task (what the organisation does)</li> <li>- Core values (what guides the core task)</li> <li>- Vision (overall long-term intention of the whole organisation)</li> <li>- Accountability structure (linear/nested hierarchy, heterarchy, democracy)</li> <li>- Democracy type (direct, representative, constitutional, evolutionary)</li> <li>- Accountability functions (governance, management, implementation)</li> <li>- Overall approach to decisions (individual/collective; voting/consensus)</li> <li>- Overall approach to planning (short/long-term, freedom/responsibility)</li> <li>- Overall approach to reviewing (self, peer, other, external, combination)</li> <li>- Overall approach to handling concerns (internal, external)</li> <li>- <i>Using Basecamp to support Corporate Governance</i></li> </ul> |

## 5.2 Presuppositions and definitions

### Core presuppositions

Core presupposition 1: It is possible to be highly rational (i.e. systematic and intellectually rigorous) about reflecting on the questions of existence.

Core presupposition 2: It is possible to develop a methodology (i.e. structured thinking process) to support this reflection – individually and collectively, over the long-term and the short-term.

### Stimulus and response in non-living matter

The simplest example of ‘stimulus and response’ can be found in non-living matter. An example of ‘stimulus’ in non-living matter is a snooker cue hitting a snooker ball on a snooker table. An example of ‘response’ is that snooker ball bumping into another snooker ball and the second ball going into a pocket.

### Stimulus and response in simple living matter

In simple living matter, there is the stimulus and response that is found in non-living matter with the addition of an ‘awareness’ of the stimulus and response. An example of this is a single cell organism being able to detect and respond to a stimulus from its internal or external environment.

### Stimulus and response in human beings

In the complex living organism of the human being, there is the stimulus, response and awareness found in simple living matter with the addition of increasing ‘reflexivity’. Reflexivity is defined as a sense of and ability to differentiate between: ‘past’, ‘present’, ‘future’, ‘self’ and ‘other’.

### Stimulus and response in modern human beings

An example of stimulus and response in modern (i.e. increasingly reflexive) human beings is the activity of ‘planning’. In planning, the stimulus is a ‘stimulus to action’. It can have a variety of sources and is referred to as the *impulse*. The response is ‘some sort of action’. In this example of planning, the awareness is ‘the gap between stimulus (impulse) and response (action)’. This ‘gap’ can be used to develop an awareness of *intention*. **Modern planning** can be defined as **being clear about ‘impulse’, ‘intention’ and ‘action’**.

### Stimulus and response in increasingly reflexive modern human beings

As reflexivity in modern human beings continues to increase, people become involved in increasingly complex patterns of planning and action, in increasingly complex organisational and societal structures. One outcome of this increased reflexivity is an increasing awareness of the actual consequences of past actions and the possible consequences of future actions. **Modern accountability** can be defined as the ability to **integrate awareness of past and possible future consequences into planning and action**. There are at least three different ways to think about accountability. One way is in terms of creating, upholding and defending a number of different ‘rights’. Another way is identifying and then trying to balance meeting a number of different ‘needs’ (e.g. individuals or groups or ‘the common good’). Another approach is to see accountability in terms of clarifying *freedoms* and *responsibilities* as fundamental aspects of individual and collective *intentions*. This way of looking at intention is compatible with either *Telos*<sup>1</sup> or *Telikos*<sup>2</sup> views of the long-term past and future, and either *Chronos*<sup>3</sup> or *Kairos*<sup>4</sup> views of the short-term past and future.<sup>5</sup>

Associative Leadership is a **specific set of skills** that enable people to  
**facilitate individual and collective development** (i.e. planning and action/implementation),  
 for **increasingly reflexive** people,  
 in **increasingly complex and accountable** organisational and societal structures.

<sup>1</sup> **Telos** (Greek): Tending towards an ultimate end (i.e. a ‘pull’ towards).

<sup>2</sup> **Telikos** (Greek): Tending towards an intentional end (i.e. a ‘push’ towards).

<sup>3</sup> **Chronos** (Greek): **Quantity of time** (e.g. “we had a meal that lasted 75 minutes”)

<sup>4</sup> **Kairos** (Greek): **Quality of time** (e.g. “we had an enjoyable meal”)

<sup>5</sup> This is the basis for the claim that our approach is compatible with a variety of personality types, learning styles and world-views.

## **6. Related documents and further reading**

### 6.1 Related documents (New Leadership)

#### Detailed presentations

Improving the effectiveness of sales people

Improving the employability of young people

#### Detailed case studies

Improving the effectiveness of salespeople

#### Theoretical underpinning

New Leadership's corporate ethos (core task, core values, vision)

The Personal Ethos Process

Theoretical framework booklet

Scientific citizenship and good governance (Academic paper in Trends in Biotechnology, 2006)

### 6.2 Further reading (others)

#### Codes of professional ethics

BACP (covers all 1-to-1 work)

CIPD (covers all consultancy, facilitation and group training work)

#### Personal Effectiveness

Recovering from information overload – McKinsey – January 2011

Task not time – HBR – February 2008

Getting Things Done – Heylighen & Vidal, Vrije Universiteit Brussel

The cost of traditional filing – YouGov survey - July 2008

#### Continuous Partial Attention

(<http://lindastone.net/2009/11/30/beyond-simple-multi-tasking-continuous-partial-attention/>)

#### Where will you be in five years – HBR

(<http://blogs.hbr.org/hmu/2011/03/where-will-you-be-in-five-year.html>)

The existential necessity of mid-life change – HBR – February 2008

#### Organisational leadership

The Leadership Imperative - <http://www.fcg-global.com/>

Creating shared value – HBR – January 2011

The democratic enterprise – Lynda Gratton (LBS) – 2003

#### Rwanda

Vision 2020 (the country's strategic plan)

Constitution of the Republic of Rwanda (2003)