



**This section of the Collaboration toolkit is made available by the Task Force for Global Health, as part of the book**

***Real Collaboration: What It Takes for Global Health to Succeed* © 2009**

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## The Journey: Leadership Toolkit

As mentioned in Chapter 8, fulfillment of several leadership roles is extremely important in global health partnerships. The most successful partnerships fill the needed leadership roles not through a single, strong individual but through complementary leadership in both internal (team) roles and external roles. Over the life of a partnership, roles assume lesser and greater importance, and one role may actually be played by several people as needed. These tools help partnerships clarify the responsibilities for each of these roles, so the person(s) assuming the role can develop an action agenda.

### LEADERSHIP: The Main Menu

<i>Internal team leadership role</i>	<i>Tool</i>
Convener	Assuring effective meeting management
Visionary	Maintaining focus on achieving the overall goal
Strategist	Updating strategy
Team builder	Developing an open partnership culture Managing conflict
<i>External leadership role</i>	<i>Tools</i>
Advocate	Getting stakeholders on board
Political influencer	Getting officials on board
Networker	Making and leveraging connections
<i>Overall leadership</i>	<i>Tools</i>
Leadership evaluation	Leadership checkup

## WORKSHEET FOR THE CONVENER: ASSURING EFFECTIVE MEETING MANAGEMENT

Whether a partnership is formally chartered or remains informal, someone needs to play the role of the convener. Ideally, this person not only sets up meetings but also facilitates them in a participative manner, setting a tone of open dialogue to create the psychic space that allows members to work together successfully. The person who serves as the convener can use this worksheet as the basis for effectively planning and carrying out meetings. In addition, the convener should make sure that every partner participates in meetings and has the opportunity to communicate ideas on how the partnership should operate.

### *Participant roles*

### *Who will fill the role*

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Initiating meetings (sending out notices, determining agenda)

Setting up meetings (choosing location, providing refreshment, etc.)

Facilitating meetings

Gatekeeping (making sure all partners participate)

Surfacing conflicts and problems

Recording and distributing notes

Communicating information

Managing logistics (setting up a phone, P.O. box, and/or use of someone's office and staff)

Identifying follow-up actions and monitoring progress

Acknowledging contributions to meeting and progress

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WORKSHEET FOR THE VISIONARY:  
MAINTAINING FOCUS ON ACHIEVING THE OVERALL GOAL

One person on the team needs to paint a vision that inspires the partners and helps them maintain their focus on achieving the goal. For this reason the visionary is also the “goal-keeper.” This role must be played by someone with a real passion for the issue and the ability to communicate that passion. The visionary in the group can use this worksheet independently, at regular intervals, to personally monitor how well the partners are maintaining their focus on the goal or to reflect on how well he or she is providing leadership in this role. The visionary could also use this worksheet as a discussion tool.

*Questions*

*Notes*

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What vision have you painted to inspire the partners and help them maintain focus on the goal?

Has everyone bought into this vision? Is the original goal still valid? What are the possible areas of disagreement?

Could the team measure and communicate progress better? How can you put the faces of those the project is trying to help in front of the partners?

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## WORKSHEET FOR THE STRATEGIST: UPDATING THE STRATEGY

The strategist has the ability to see the big picture and the details simultaneously and to articulate the possible pathways to achieving the goal. The partner who assumes strategy leadership will need to monitor progress against that strategy/strategies constantly, to identify the need to follow the strategy more closely, or to change the strategy based on circumstances.

<i>Major strategy/strategies</i>	<i>Progress toward strategy/ strategies</i>	<i>What needs to be changed?</i>

DIAGNOSTIC WORKSHEET FOR THE TEAM BUILDER:  
DEVELOPING AN OPEN PARTNERSHIP CULTURE

The role of team builder involves helping the partners understand the various perspectives in the room and bridging those views in a way that aligns all partners behind the central goal. The person responsible for team building can use this worksheet to diagnose the culture of the partnership and develop ideas for gradually moving toward a more open culture, where members can problem-solve together (see Chapter 4).

<i>Issue</i>	<i>How the issue applies to our partnership</i>
Among our members, are there cultural differences across regions and countries?	
What are the cultural differences among the participating organizations (including governmental, nongovernmental, and private-sector organizations) and across such different sectors as health, education, finance, agriculture, and transportation?	
Which of these cultures characterizes each partner's organization: closed, synchronous, random, or open?	
What value does each culture represented provide to the team?	
What are the cultural differences among individuals, including values, style, knowledge, and self-interest?	
How can we move to a more open culture, in which participants work together to solve problems?	

## WORKSHEET FOR THE TEAM BUILDER: MANAGING CONFLICT

In situations when two members of the group are in conflict, the team builder can use this tool to plan ways to manage the conflict. Methods may range from private discussions between the team builder and each individual to a three-way meeting facilitated by the team builder to coaching by an external consultant. This worksheet will help the team builder clarify the nature of the conflict and plan how to resolve it.

<i>Steps</i>	<i>Questions</i>	<i>Conclusions</i>
Diagnosis	Along the scale of assertiveness, where does each person lie?  Along the scale of cooperativeness, where does each person lie?	
Planning	What are the underlying concerns of each partner?  How can you convey the concerns of each partner to the other privately?  Is it likely the conflict can be lessened without a meeting of the two partners? If so, what steps can be taken?  If the conflict indicates a meeting is needed, what is the best way to bring the two partners together for a productive exchange?	
Facilitation (if needed)	What opening comments can you make to create a nonthreatening atmosphere and frame the importance of collaboration?  What will you ask each partner to convey to the other?  What specific request will you make to each partner for behavior in upcoming team meetings?	

**WORKSHEET FOR THE ADVOCATE:  
GETTING STAKEHOLDERS ON BOARD**

Every partnership has a need for someone to play an advocacy role, a passionate spokesperson who can champion the cause externally and sway others to support the project’s goal. In some cases advocacy is directed toward generating funds or services; in other cases the purpose is to bring NGOs and agencies on board. Regardless of the stakeholder group being targeted, a critical function of the advocate is to identify areas of mutual interests that form the basis for working together. The person who plays the advocate role can use this worksheet for planning stakeholder communication and interaction.

<i>Stakeholder</i>	<i>Mission</i>	<i>Mutual interests</i>	<i>Opportunity to interact</i>	<i>Plan for action</i>

**WORKSHEET FOR THE POLITICAL INFLUENCER:  
GETTING OFFICIALS ON BOARD**

Many partnerships have a need to influence government officials, whether the goal is funding, legislation, or behavioral change. Although the role is similar to the role of the advocate, the person who plays this role needs to have not only advocacy skills but also relationships among the targeted officials. The partner who takes responsibility for exerting political influence can use this worksheet to plan interactions between members of the partnership and government officials.

<i>Targeted official</i>	<i>Opportunities for interacting</i>	<i>Partners to tap for interacting with officials</i>

**WORKSHEET FOR THE NETWORKER: LEVERAGING CONNECTIONS**

The networker role calls for a leader who has already developed a large network of relationships across multiple sectors. This person is the one who can readily tap needed members for the partnership or open doors to talk with individuals who are key to carrying out the partnership's strategy. The networker can use this worksheet to plan ways to leverage both his or her connections and those of other partners.

<i>Partner</i>	<i>Connections with potential influencers</i>	<i>Plans for interacting with influencers</i>	<i>Desired outcome</i>

## LEADERSHIP CHECKUP

This tool can serve as a discussion guide, to allow the partnership to reflect on how well the partners are filling leadership roles and what needs to be changed. All partners should participate in the discussion, not only the leaders.

	<i>Poor</i>	<i>Good</i>	<i>Excellent</i>
<hr/> <i>Sharing leadership</i> <hr/>			
How well are we filling gaps in leadership? Are all of the internal and external leadership functions being carried out?			
How well does the partnership's overall environment encourage people to voluntarily step up to leadership roles?			
How easily do people step down when their leadership role is no longer needed?			
How well are the leaders suppressing their egos and personal interests to work in the partnership's best interests?			
<hr/> <i>Convening</i> <hr/>			
How well are meetings planned?			
Is the facilitator able to create an open environment, in which all members participate?			
Is needed information being communicated before and after meetings?			
Are follow-up actions clarified at meetings and monitored afterward?			

*Communicating a vision*

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Has one of the partners communicated a clear vision that other partners support?

Do we have a clear goal and way(s) to measure progress against that vision?

*Shaping a strategy*

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Is it clear how we will achieve the vision?

Are changes needed in the strategy we have developed?

*Building a team*

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Where are we along the spectrum of developing teamwork (recognition of differences, conflict, greater harmony, or accomplishment)?

Are we becoming more cohesive?

*Advocating*

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Do we have a partner with the ability to convey passion about our cause to external audiences or individuals?

Is that partner actively serving as our spokesperson?

Have we seen evidence that behaviors are changing as a result?

*Poor*

*Good*

*Excellent*

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*Achieving political influence*

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Is one of our partners able to tap into the right government leaders at the right time?

In what government area do we need to exert more influence?

*Networking*

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Are we taking advantage of the full networking capabilities of our partner group?

Do we have a plan for networking among key stakeholder groups?

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