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| --- | --- | --- | --- | --- |
| **PHASE** (Note 2) | ***DISCOVER*** | ***DESIGN & DEVELOP*** | ***DEPLOY*** | ***SUSTAIN*** |
| **Core Methods**  (Note 4)  (Note 6) | * **Action Learning** * Design Thinking * Change Leadership * Leadership System | * **Design Thinking** * Action Learning * Change Leadership * Leadership System | * **Change Leadership** * Action Learning * Design Thinking * Leadership System | * **Leadership System** * Change Leadership * Action Learning * Design Thinking |
| **Mindsets**  (Note 1) | * **Growth** * Bias for Action * Human Centered * Greater Good * Abundance | * **Human Centered** * Growth * Bias for Action * Greater Good * Abundance | * **Bias for Action** * Growth * Abundance * Human Centered * Greater Good | * **Greater Good** * Growth * Human Centered * Abundance * Bias for Action |
| **Leadership Role**  (Note 9) | ***Explorer*** | ***Architect*** | ***Pioneer*** | ***Sustainer***  *(Steward of the System)* |
| **Leadership Dilemmas** (Note 7) | * Visible &Invisible | * Structure & Creativity | * Short Term & Long Term | * Sustain & Adapt (Note 10) |
| **Leadership Core Values** | 1. Clarity 2. Humility 3. Courage 4. Adaptability 5. Endurance 6. Will to Succeed | 1. Humility 2. Clarity 3. Courage 4. Adaptability 5. Endurance 6. Will to Succeed | 1. Clarity 2. Humility 3. Courage 4. Adaptability 5. Endurance 6. Will to Succeed | 1. Endurance 2. Clarity 3. Humility 4. Courage 5. Adaptability 6. Will to Succeed |
| **Leadership Core Skills** | * Foresight * Vision * Ambiguity/Uncert Tolerance | * Empathy * Creativity * Systems Thinking | * Resilience * Presence * Persuasion | * Organization Design |
| **Leadership Agility Stages** (Note 3) | * **Achiever** * Catalyst * Expert | * **Expert** * Achiever * Catalyst | * **Achiever** * Catalyst * Expert | * **Catalyst** * Achiever * Expert |
| **Supportive Processes & Tools** | * ***Liberating Structures*** (Note 5) * ***Peer Coaching*** (Note 8) | * ***Liberating Structures*** * ***Peer Coaching*** | * ***Liberating Structures*** * ***Peer Coaching*** | * ***Liberating Structures*** * ***Peer Coaching*** |

**31 Dec 2016**

NOTES

Note 1: The growth mindset is described in Jeanne Liedtke et al, *The Catalyst* . The growth mindset came out of the work of Prof Carol Dweck (*Mindsets)*

Note 2: Phases (discover, design/develop, deploy, sustain) overlap. In addition, one often circles back to a phase to adapt to changing context.

Note 3: Stages are discussed in Bill Joiner, *Leadership Agility.* The stage in bold is predominant in the given phase. (Leadership Agility follows on the work on adult maturity done Robert Kegan and Lisa Lahey.

Note 4: The predominant method is highlighted in bold. Our design thinking approach is based on multiple schools of thoughts and methods including: IDEO, Stanford University’s Hasso-Plattner Institute, Luma Institute, Darden School of Business (University of Virginia), and Roger Martin, Rotman School of Business (University of Toronto).

Note 5: *Liberating Structures: The Surprising Power of Liberating Structures: Simple Rules to Unleash A Culture of Innovation*  (Keith McCandless et al) is a set of tools to facilitate conversations about innovation and change.

Note 6: The core methodologies underlying the change leadership include the social psychology work of Albert Bandura (Stanford University) as portrayed in *Influencer* and *Switch* as well as the works of Rick Mauer (*Managing Change from the Middle)* Prof Robert Kegan at Harvard (*Immunity to Change*), Jennifer Garvey Berger, Prof Bob Marshak at American University (*Covert Processes at Work: The Five Hidden Dimensions of Organizational Change) and* Jennifer Garvey-Berger, *Simple Habits for Complex Times: Powerful Practices for Leaders.*

Note 7: The managing dilemmas method is based on a number seminal thinkers including Fons Trompenaars, Charles Hamden-Turner, and Barry Johnson (Johnson has focused his work on the management of “polarities.”

Note 8: Peer coaching is a method to provide support, transfer of knowledge, advice, feedback to peers across an organization or organizations. Our peer coaching methods are based on the work of Carter McNamara—one of the pioneers of action learning and peer coaching in the US. ([www.actionlearningsource.com](http://www.actionlearningsource.com))

Note 9: Work on leadership archetypes began in a collaborative effort between John Latham and Chuck Appleby when the former was the Executive Director of the Monfort Institute, at the University of Northern Colorado). Much of the emphasis of this work was to identify the dilemmas faced by leaders in fostering organizational innovation and transformation.

Note 10: Jim Collins, ***Built to Last*** (Sustain the Core/Stimulate Progress)