

Every Leaders journey starts with a small step and a big bag of tools...

I really admire The Elizabeth Casson Trust's determination to focus their leadership work on the need for Occupational Therapists to seize control of their own professional outcomes and become leaders themselves.

As an outsider looking in, it appears to me that this approach has the potential to stimulate a real appetite for leading change at grass roots level. Occupational Therapists standing up for themselves, their profession and their patients by leading the change they intuitively understand needs to happen to achieve better life outcomes for everyone. Having met lots of inspirational women who also happen to have chosen to be Occupational Therapists; it is equally clear to me that the skill and will to create this kind of sustainable change exists.

The Elizabeth Casson Trust has made sure funding is available for projects that provide concept, organisational or service leadership as well as those that invest in team and people. For those of you who have seen the bid process and are interested but maybe feeling a little daunted about building a proposal or getting your project underway and keeping it on track there is plenty of help available. There is great guidance on how to engage with the bid process itself.

Occupational Therapists have told me how pressured their everyday lives are. I know how it is to feel overwhelmed by the sheer size or complexity of the challenge before me, on top of an already full-on day job! Like me, many people felt so rushed that they had little time to think about longer-term solutions, its tough enough getting through the average day without taking on more. What I discovered is that I didn't need to rely purely on my own resources, there are lots of helpful tools that I could draw on to help me build and keep my projects on track.

Over the years I used lots of different tools and models to help me overcome those doubts and to deliver sustainable change. They all have their benefits but in this blog I'm going to focus on a few that you might find helpful as you develop your thinking and your project. The first model is the **Congruence Model** which you can find more about here:

https://www.mindtools.com/pages/article/newSTR_95.htm there are lots of images of the model at work that you may also find helpful:

<https://www.google.co.uk/search?q=congruence+model+images&tbm=isch&tbo=u&source=univ&sa=X&ved=2ahUKEwiqhYazjoHeAhUIW8AKHfvRDHoQsAR6BAgAEAE&biw=1168&bih=897>

This model may look complex but it's actually based on a few simple propositions. When you start out on any project, you and your colleagues must have absolute clarity about the problem you are tackling as well as a deep understanding of your desired outcomes and the impact that you will create. In other words, where you are truly starting from and where you hope to get! It is particularly helpful if you are hoping to introduce a new service, way of working or process to an established system. Why? Because it will help you to identify how deeply in to the existing infrastructure and practice you need to delve to create the change that enables and supports your way forward. Every organization has its sacred cows. Knowing whether you are about to threaten one of them is key to understanding how much influence you are going to have to exert to ensure you have all the levers for change at your fingertips.

The Congruence Model creates an opportunity to make sure that you understand every aspect of your starting point before you step out on your change journey. It will help you invest time in the planning stages so that your implementation is faster and deeper because you have considered everything and feel confident about what can be achieved.

It creates clarity not only from a formal policy and process point of view but also from a deep and pragmatic understanding of the informal organization or the way people really get things done. It allows you to stop and review what you see and experience on a daily basis. Put another way it enables you to confront the reality of the situation and to make it more meaningful to those around you by describing it as they actually experience it! It also means that you have taken the time to really consider what is involved in creating the change. Sometimes it's not just about people but the policies, processes and conditions that they are subject to. Using this model, you can consider things at a whole system level. This will help you to avoid making basic mistakes because you invested the time to truly understand all the individual pieces of the puzzle and to identify especially those that will need to change, in order to achieve your desired outcomes.

For a project to be successful, I have learnt that everyone working with you must share absolute clarity about the purpose of the project and their role in making it happen. They must feel enabled and empowered to act, while you are sure they are focusing on the outputs that your project is there to deliver. This means that each person must understand and believe in the importance of the task and of their role. The Congruence Model allows you to describe this journey, to prioritise with colleagues, to assess risks and to give the clear guidance that helps everyone involved move forward together.

Once you have a realistic picture of where you are starting from and are clear about what you hope to create you can really start to focus on pinning down what actions will deliver your desired outcomes.

Once I was clear on what the whole system changes involved, I always found it really helpful to test my thinking on what would or wouldn't work by building a series of smaller **Theory of Change** models. This really helped me to understand what would need to happen to create change, to test assumptions, determine what was and wasn't in scope and to start the process of breaking the project down into manageable pieces. It also helped me to understand where there were critical dependencies, perhaps on an operating system or my ability to influence a partner or process owner. It also allowed me to draw on the experience of my team to build alternatives and contingencies. As a leader I learnt that going through this process ensured that all our skills and thinking were brought to bear on the problem and the solution. I think our change making capacity and understanding of what was needed was stronger because of the opportunities to challenge and build solutions together that this tool provided. It's also an exciting way to learn about your ability to both collaborate and direct!

There is a great downloadable DIY kit available via NESTA¹ and created in collaboration with the Open University². You'll also find a number of images demonstrating how the Theory of Change model has actually been used. There are some super models on how to create change and you can explore these at: <https://diytoolkit.org>. At this site you will find lots of tools (just click on Tools!) that provide help and guidance for pretty much every stage of the project lifecycle from concept development to delivery.

I found that I developed my own particular favourites as I gained more experience. Some tools just caught my imagination and helped me work more confidently and purposefully. I'd really encourage you to be curious about the tools available to you, to investigate and experiment until you find the one that resonates for you or is particularly suited to your current leadership challenge.

In any project or change activity it is really important to think about the **Brand** that you project. What are the key themes you need people to understand? Not only in terms of the impact you are going to generate, but also how you will deliver it and the way your colleagues will experience it. This is particularly important if your project requires attitudinal or behavioural change.

One of the change programmes that I am most proud of tackled work place bullying. It was called 'Let's Cut it Out'. The branding was important because it had to be clear, unite and engage people (some of whom were victims), in a safe place, while also expressing the businesses' determination to deal with and ultimately dismiss those who bullied and harassed their colleagues. It needed to be characterized by integrity, hope and courage to stand any chance of success. It also had to reach over 100,000 people in 176 countries so it had to have global resonance. In order to make sure that we got our messages across and improved our chance of success by building allies and grabbing people's attention we used a series of

employer branding tools to build the projects personality and to help people take on board its sometimes difficult messaging. One of the most difficult messages was that those who witness bullying behaviours but do nothing to stop them are also complicit! Clearly this was a difficult subject. It needed to be approached strongly but with sensitivity. Our theory of change indicated that we needed to ‘train not blame’ bystanders and the brand needed to reflect that before people felt threatened and became unable to engage with the change!

Most change challenges people emotionally. Those affected will need to feel that the project and its leaders have the ability to put their best interests at heart, see things from their point of view and understand how the change will impact on their lives. All this can be communicated through your brand and its underlying brand promises, helping others to open up to and engage with the change that you are proposing.

I’ve chosen a few links that might help you think about the brand you need to deploy to get others behind your project: here’s one on how to think about it in terms of the organisation <https://medium.com/hr-blog-resources/employer-branding-on-social-media-best-examples-84fec1f535e4> here’s an interesting look at the **Brand Triangle**. This is an exciting tool, which you can use to bring personality and emotional intelligence to your work. It’s powerful where individual leadership is important but also works for projects such as ‘Let’s Cut it Out’ where we needed collective as well as individual engagement. Here’s another example of a tool that has the power to help you magnify your impact, The **Keller Brand Equity Model**: to <https://www.mindtools.com/pages/article/keller-brand-equity-model.htm>. This tool will help you think about how you project yourself and the tools you can call on to influence others to join the drive for change. These sites give both brand and individual examples: <https://www.careeraddict.com/12-examples-of-brand-personality-to-inspire-you>

The final concept, which I believe made the biggest impact on my ability to deliver change and which I’d like to share with you is **Trusted Leadership**. It will help you explore the characteristics needed to, successfully, take others with you on your change journey and to reflect on your personal approach to leadership. What behaviours and habits will it take to deliver your project successfully and inspire sustainable change?

Trusted leadership has a growing global resonance, as our workplaces become ever more demanding and challenging, making leading through change a core leadership skill. Its also naturally inclusive enabling very different people, cultures and professions to work together by finding their shared purpose. I found using this approach made the difference that allowed me to keep moving forward.

Stephen Covey³, perhaps most famous for his book, the ‘Seven Habits of Highly Effective People’, describes trust as the ‘glue of life’. He describes it as the most essential ingredient in

effective communication, the fundamental principle that holds all relationships together. I think he's right but what does that mean in practice? What are the behaviours that being trusted leaders demand of us? According to Stephen Covey there are thirteen characteristics that set trusted leaders aside and make them successful. Veronica Hope Hayley⁴ at Bath University really builds on these characteristics to describe the kind of leadership skills that make us the sort of human and inspiring leaders that get things done because others trust our integrity, benevolence, ability and predictability. For me, this was a way to achieve, in a male dominated, evidence-based world that was not natural to me. I would thoroughly recommend Veronica's work. You'll find one of her slide packs on trust and leadership here: <https://slideplayer.com/slide/4657745/> but she has written many other articles that you may find as inspiring as I did.

If you are thinking about bidding for funding for a leadership project my advice is go for it! You are not alone. There are people and tools that will help you create change. As Margaret Mead once said; *"Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has"*.

Caroline Waters OBE

¹ NESTA <https://www.nesta.org.uk/> A global Innovation Foundation who develop and back new ideas to tackle the big challenges of our time, from the pressures of an ageing population to stretched public services

² Open University <https://www.open.ac.uk> a public [distance learning](#) and research university with numerous free resources for leaders and practitioners.

³ Stephen Covey 'Seven Habits of Highly Effective People. First published in 1989, this is a business and [self-help](#) book. In this book Covey promotes what he refers to as "*the character ethic*": aligning one's values with so-called universal and timeless principles to create greater effectiveness. Covey defines effectiveness as the balance of obtaining desirable results with caring for that which produces those results.

⁴ **Veronica Hope Hailey** Vice-President **Bath University** BA, MSc, PhD

Veronica started her first teaching job in 1990 at Cranfield School of Management, lecturing to MBA and PhD students. In 1993 she moved to the University of Cambridge in the newly created Judge Institute for Management Studies and became a Visiting Fellow at the London Business School. She returned to Cranfield and was made full Professor/Chair in 2002. She moved to the University of Bath in 2004 as a Chair in Strategy. This was followed by six years at Cass Business School in London including a promotion to Associate Dean. She returned to Bath in 2012, becoming Dean in 2013. She was promoted to University Vice President in 2017.

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