The Chief of Staff

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About The Typeface

The Chief of Staff is typeset in Financier Display 24 for headings, Untitled Serif 12-15 for sub headings, Untitled Sans 10 for base text and the footnotes are set in Untitled Sans 8.

Financier Display

Financier Display is a serif typeface designed by Kris Sowersby of Klim Type Foundry. It was created for the redesign of the Financial Times in 2014 and later released as a retail font in 2016. Financier Display is available in six weights with matching italics as well as a corresponding text family.

United Serif and Untitled Sans

Untitled Sans and Untitled Serif are quotidian typefaces. Untitled Sans is a plain, neogrotesk sans validated by the ideas of Jasper Morrison and Naoto Fukasawa's Super Normal project.

Untitled Serif is drawn from the old-style of typefaces: the post-Caslon, pre-Times workhorses offered by almost every metal type foundry of the time. Untitled Sans and Untitled Serif are related neither by skeleton nor a traditional aesthetic connection, but by concept only. They have a deliberate aesthetic of not being designed by anyone in particular.

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The Chief of Staff Association

In the modern era, chiefs of staff have uneven access to the global bodies of knowledge that exist within and about the profession. Without a central information repository, there is no structure to guide the evolutionary process and continued growth of the field of study. To rectify this, The Chief of Staff Association, together with leading academics and practitioners, offer The *Chief of Staff* journal; a recognition of the contributions, importance and influence of an intrinsically humble occupation.

The Chief of Staff acts as a clearinghouse for data, knowledge, skills and ideas on one of the world's most important but understudied professions. In doing so, we equip chiefs of staff with the tools necessary to expand their knowledge and increase their effectiveness. We provide current and future generations of chiefs with the requisite medium to inspire opportunity and promote the growth and admiration of the role. The journal addresses practical, theoretical and historical aspects of the profession, guiding the analysis of historical decisions and inspiring future leaders. As such, we are interested in submissions that present both contemporary ideas and classic insights.

The Chief of Staff Association (CSA) is the peak international professional body for chiefs of staff in leading corporations, governments, the military and diplomatic corps. Our members have an impact when and where it matters through facilitated connections, professional certification and curated forums. The purpose of The Chief of Staff Association is to advance the influence of professional chiefs of staff and recognise the role of chiefs as connectors of global leaders. Three pillars underpin The Chief of Staff Association. Knowledge, Connection and Community.

Knowledge

The CSA strengthens and enhances the integrity of the chief of staff profession through a comprehensive education programme that builds member competency, capability, and performance; culminating in certficiation at the University of Oxford.

Connection

The CSA advance connections to achieve immediate outcomes and create the ideal conditions in which influential, long-term authentic relationships can be formed.

Community

The CSA is your community of peers who together build strength, confidence and resilience: extraordinary people with extraordinary access across the globe.

Structure

Incorporated in the State of Delaware in the United States of America, The Chief of Staff Association is chartered as a public benefit corporation. A public benefit corporation is a private company that produces public benefits and operates responsibly and sustainably.

Editorial Board

Editorial Board

Board of Governance

Jordan Blashek
Chairman (New York, USA)

Mr Blashek is a Director at Schmidt Futures, a philanthropic initiative founded by Eric and Wendy Schmidt, where he oversees their talent, national security and shared prosperity investments. Jordan is also a veteran of the US Marine Corps with two tours of duty in Afghanistan and Africa. He holds a JD from Yale Law School, an MBA from Stanford, and a BA from Princeton University.

Dr Aron D’Souza
Secretary (New York, USA)

Dr Aron D’Souza is a former diplomat, academic and entrepreneur. He was the Honorary Consul of the Republic of Moldova in Australia. Dr D’Souza led PayPal founder Peter Thiel’s litigation against Gawker Media involving the wrestler Hulk Hogan, which resulted in one of the largest invasion of privacy judgements in history. He is the editor of *The Journal Jurisprudence* and has a PhD from the University of Melbourne and a law degree from Oxford.

John Porter
Director (Geneva, Switzerland)

Mr Porter is a UK tech entrepreneur with close ties to Silicon Valley. He holds degrees from Oxford, Sciences-Po Paris, and Stanford. He is Chairman of AML Analytics Ltd and is a key stakeholder in Telos Corporation, a cybersecurity specialist supplying the DoD and AWS. He has served on the boards of both Stanford Graduate School of Business and the Said School at Oxford, he is a Trustee of the Barbican Centre Trust and on the Board of the Verbier Festival.

Board of Governance

Santiago Perez Teuffer

Director (Mexico City, Mexico)

Mr Teuffer strong Latin-American network and diverse business experience between Latin America and the US, provide a valuable edge for him to serve on the Board of the CSA. Santiago has an extensive banking career, and after pursuing his graduate studies at Stanford, went back to Mexico to pursue an entrepreneurial career in the energy industry. Santiago has an MS in Energy from the Stanford School of Energy, and an MBA from the Stanford GSB.

Trent Smyth AM

Director (Melbourne, Australia)

Mr Smyth has served as the Honorary Consul for Malawi for eight years and the Secretary of the Consular Corps Melbourne since 2014. Trent is the founder of the Sports Diplomacy Group which assists companies and major events in tapping into diplomatic and Government channels to export their specialist capability through strategic advice and partnerships. Mr Smyth is a Director of the Australian Grand Prix Corporation and holds a Bachelor of Commerce and an MBA from the University of Melbourne.

Certification at Oxford University

The Chief of Staff Association has partnered with Saïd Business School at the University of Oxford to create the Chief of Staff Executive Certification Programme. The programme is available exlusively for Members and Fellows and is conducted in-person at Oxford University over the course of four days.

In addition to the academic syllabus, the programme features insights from invited political, diplomatic and business leaders. These speakers share views on the core competencies of the role and understand emerging challenges. Delegates participate in shared discussion and debate, enriching their perspectives and capability.

Delegates are encouraged – formally and informally – to share best practice and learnings gained in their careers and current roles. At the end of the programme, participants not only form strong friendships but also gain a network of competent peers who can act as ongoing sources of advice and professional support.

Programme Director Rupert Younger

Rupert Younger is the founder and director of Oxford University's Centre for Corporate Reputation and co-founder of The Finsbury Group. He is a recognised expert on how reputations are created, sustained, destroyed and rebuilt and has advised some of the world's largest organizations over the past 30 years.

He is the co-author of the best-selling book, *The Reputation Game* (published in October 2017 and now available in six languages), and co-author of *The Activist Manifesto*, published in 2018.

Membership of The Chief of Staff Association

The CSA is a community of peers who together build strength, confidence and resilience: extraordinary people achieving extraordinary outcomes in locations across the globe.

Levels of Membership

Associate (ACSA)

The Associate Membership programme reflects the CSA's commitment to convene a global community of highly skilled chiefs of staff at different stages of their careers.

It has been designed to support the personal growth and professional development of the next generation of chiefs of staff.

Associate Members are equipped with role-specific skills through the Core Competency Programme – a highly curated education stream that prepares participants for the challenges faced by contemporary chiefs of staff.

Member (CSA)

Membership is your passport to find, connect with and learn from other senior chiefs of staff who are experts in their field.

In addition to the Core Competency Programme, Members access two exclusive education streams; The Situation Room, designed to challenge experienced chiefs of staff in challenging role-play scenarios, and the CSA Leadership Series, bringing to life the insights from global leaders.

Members also enjoy the security of reserved enrolment in The Chief of Staff Certification Programme - a four-day immersive residential programme at Saïd Business School, Oxford University.

Fellow (FCSA)

Fellowship is reserved for professionals of influence who seek connection with an international network of individuals of equal status. Members serve heads of state, principals in the world's leading corporations and significant public institutions.

In a world where relationships are fundamental and time is of the essence, Fellows areto organise confidential personal introductions, at the time and place you need them.

In addition to all the benefits of Membership, Fellows of The Chief of Staff Association receive:

- Complimentary Enrolment in the Chief of Staff Executive Certification Programme at Saïd Business School, Oxford University.
- A Profile in *The Chief of Staff* , The Chief of Staff Association's peer-reviewed academic journal.
- The opportunity to nominate a chief of staff colleague for complimentary full membership of The Chief of Staff Association.

"Trust and relationships are the foundations of progress. The Chief of Staff Association is based on this powerful insight and provides a network of authentic relationships along with the credibility and trust needed for growth."

Brigadier General Matthew C. Isler, U.S. Air Force (Ret.)

FOREWORD

The Rt. Hon. Baroness Amos, CH PC
Master of University College, the University of Oxford, UK

It's a pleasure to have been asked to write the foreword to this edition of the journal, particularly given the focus on the contribution of women. Across the world we recently celebrated International Women's Day and the contribution women are making in all areas of life. But we shouldn't have to do this once a year, it should be something that we recognise and value every day. But even as we celebrate women's success and achievement we confront the trauma and tragedy which millions of women live with every day. The reality of sexual violence and exploitation of women, the horror of living in conflict zones, the challenges of holding family together as refugees or displaced people, and dealing with ongoing harassment and discrimination. That is why this edition and subsequent editions of this journal is so important. I hope it will encourage young women to see that they can play a powerful role as influencers and as leaders through public service and administration. The possibilities are endless.

Chiefs of staff have the opportunity to work with leaders from a range of backgrounds and perspectives. They help to guide, negotiate, advise, consult. They bring experience, expertise and wisdom to bear when difficult decisions have to be made.

There are many different ways in which we can contribute to growing more equal and just societies. Becoming an excellent chief of staff and supporting change is one route.

“Growth Through Deliberate Practice”

Dr Dambisa Moyo
Economist and Company Director

Dambisa Moyo didn’t plan to turn her bachelor’s degree in chemistry into a DPhil in economics from Oxford. Nor did she plan to write books with topics ranging from China’s pursuit of resources, to the flawed premise behind aid to Africa, to why democracy is failing to deliver economic growth.

Yet, as she sits in her California home reflecting on the importance of continuous learning, it’s clear why her career path has looked more like a curvy road than a straight line. And why an array of topics interest her.

“I like optionality,” Moyo says, because it affords her the opportunity to see the world’s many challenges through different lenses. Moyo believes through continuous learning, she (and others) can replicate what people who came before her have done well, applying their ideas to modern-day efforts at making the world a better place. She also can understand what caused others to make mistakes, and therefore she can avoid mimicking actions that could lead to the same negative result.

“There’s no real end point to learning,” she says.

For Moyo, that commitment to nonstop learning requires she maintain what she describes as a “regimented schedule,” ensuring that her personal life and professional life get the attention they require. And what she’s taken on in her personal life shouldn’t be forgotten: her website notes that in her spare time, “she runs marathons, practices Pilates and is an amateur boxer.” Her travels for work and pleasure have taken her to 65 countries around the world.

Moyo, who currently sits on the boards of 3M and Chevron, compliments Anders Ericcson, the Swedish-born psychologist who passed away in 2020, for his work in human performance. His research informs how Moyo tries to live her life.

Ericcson believed it was not enough to simply learn; repetition alone was insufficient to master a skill. Rather, it took deliberate practice to really become learned about everything from playing a musical instrument to fluently speaking a language.

According to the Deliberate Practice Institute, “a rigorous sequence of ongoing performance assessment, tailored goal-setting, and systematic skill-building informed by expert feedback” provides the foundation for deliberate practice. Ericcson contended deliberate practice wouldn’t necessarily be enjoyable or motivating, but it was essential for mastery. Through deliberate practice, skills are continuously worked on with the goal of advancement and include that aforementioned feedback.

“I believe in coaches,” Moyo notes, saying that she has a coach for almost every aspect of her professional life. And she eagerly reaches out to other experts who can provide additional perspectives, guaranteeing she has multiple viewpoints as she writes about the topics of relevance to her. She also haa a group of friends who don't carry the title of coach but are instrumental in honing her ideas.

"They don't think like me," she says, and they come from diverse fields and industries. These "informal" meetings, as Moyo describes them, almost always involve her and just one other person and are especially valuable when she is approaching a "big decision."

This multi-pronged approach to seeking advice and feedback is mandatory so that blind spots are avoided, Moyo contends. And she believes blind spots can be more evident in people who specialise in one academic field or professional industry.

Moyo says that through her deliberate practice and engagement with her coaching network she's able to take an idea and "build out" its principles and virtues. She adds "deep reading" on some topic for at least one hour each day to allow her to craft what she'll write or what ideas she'll present.

Currently, Moyo is "super excited" as she learns more about Carol Dweck's work on a growth mindset. In her TED Talk, which has been viewed by more than 12 million people, Dweck tells her audience of research into children and persistence. She reports some students "run from error" because they believe they've failed. But some people "engage deeply" and "process the error; they learn from it and they correct it." These students demonstrate a "growth mindset."

Dweck asserts it's incumbent on school principals and educators to instill a growth mindset in their classroom: Effort and difficulty should make students think about how to make connections between things because this is how students become smarter.

Dweck's research also has relevance to adults; we, too, can be guilty of responding to challenges much like the students referenced in Dweck's TED Talk did. Adults stuck in a fixed mindset aren't likely to accept new challenges if they believe they might fail, and people in authority positions operating with a fixed mindset might attempt to undermine their subordinates so that their successes don't seem threatening to the manager. However, people with a growth mindset embrace opportunities to make themselves and those around them better. They use effort and steadfastness to constantly improve. Failure isn't in their lexicon.

Like many principals, Moyo thinks of herself as a generalist, which she defines as someone who can "duck and weave" around and within different ideas to see how specific aspects can be incorporated into a new concept. That framework also means Moyo will identify challenges and opportunities across decades and countries.

Moyo drew considerable praise and criticism for her contention that institutional aid to Africa bred corruption and dependence, trapping the continent into a cycle from which it could not easily escape. That thesis was developed in her book "Dead Aid: Why Aid Is Not Working and How There Is a Better Way for Africa".

Oprah Winfrey named Moyo to her first "power list" of "20 remarkable visionaries." In recognising Moyo, Winfrey complemented Moyo "for going against the grain" by criticising international aid for Africa. In 2009, TIME magazine also identified Moyo as one of its 100 most influential people around the world. It stated: “Unsurprisingly, the development industry doesn’t like her critique. But advocates of aid do have to come to grips with Moyo’s fundamental question: Why is Africa so much poorer after receiving billions of dollars in assistance? Just as important, how can young African professionals like Moyo be attracted back home, not out of charity but to pursue opportunities?”

Although Moyo doesn’t have her own chief of staff, there are many people who work for her and her husband, Jared Smith, who founded Qualtrics. For Moyo, whether someone holds the title chief of staff or something different, the purpose is the same: “I really urge people who work for us to not come to us with problems. Just fix it,” she says. They should be empowered to see themselves as problem solvers, who later can discuss with the principal what the problem was and how it was taken care of.

“It’s a challenging job,” she acknowledges, and the more experience the person has, the more self-directed he or she is likely to be. “I see a chief of staff as a doppelganger to myself,” she says.

She urges people to read the famous Harvard Business Review article titled “Management Time: Who’s Got the Monkey?” In it, readers are reminded that “most managers spend much more time dealing with subordinates’ problems than they even faintly realise.” The effect is that managers assume the subordinate’s role, and it’s now incumbent upon them to address the subordinate’s concerns instead of focusing on the challenges that ought to be the purview of the principal. Managers ought never place themselves in positions where a subordinate’s problem, which he or she is capable of addressing, becomes theirs.

It’s clear Moyo thinks and cares deeply about the issues that matter to her. That’s true when she thinks of her parents, as well. She thinks of them as “pioneers.” She recalled how they came to America from “rural Africa” in the 1970s – a time without the modern travel conveniences we enjoy today – and “they showed up and figured it out.” During that time, Moyo’s father was doing post-graduate studies in the U.S. before the family eventually returned to Zambia. Her parents mostly conversed in English, providing Moyo an important leg up as she matured from childhood into adulthood. Moyo once said, “I am fortunate: my parents told me the world was my oyster, when they could have said I wouldn’t make it for a lot of reasons - rural, girl, small African country. So, no regrets.”

Moyo admits she’s nowhere near ready to slow down. But whenever that time comes, she hopes she’ll be remembered as a “great model citizen” and someone who was “engaged, curious (and) demanding” in combating issues that must be addressed.

Transcribed and Edited by Dr Anthony Moretti - Associate Professor of Communication, Robert Morris University

“Empathy In Practice”

A Profile of Ms Shereda Nosakhare

Chief of Staff to the Mayor of Oakland (2017 - Present)

A Commitment to Service

Shereda Nosakhare is a woman of compassion who is relentlessly committed to helping the people of the City of Oakland. She recalled a story of a woman who was continually calling the Mayor’s office during the middle of the night, complaining about a distressing noise that would keep her awake. Shereda could have swept it aside, focusing on more urgent and public issues. But she could hear the distress in the woman’s voice and was determined to assist her. She tasked city staff to track down the source of the noise - discovering that it was being caused by a large factory that needed to replace an outdated industrial fan. Because of where the woman lived, in the silence of the night the screeching noise from the factory was reaching her home. The fan was fixed and the noise disappeared. The woman was overjoyed that someone had finally listened to her.

From Paediatrician to Public Service

Born in a small town in Louisiana, Shereda moved to California when she was just five years old. Her family in Louisiana insist that she is a “southern girl at heart”, but she admits Oakland is “all she knows” and she “lives, breathes and sleeps’’ it in every way. Shereda’s mother was a nurse and her father a mechanic, and she initially pursued a career in science, her high school passion. She began her undergraduate degree in Portland, Oregon as a biology major, aspiring to become a paediatrician. But she quickly discovered that her high school interest in science wasn’t translating into college.

However, there was one class which she was enjoying much more than the others - political science. Realising that biology was no longer for her, Shereda switched her major and moved to Salzburg, Austria on exchange for a year. When she returned, she spent her senior year interning in the campaign of a female Democratic candidate who was running for office. After graduating, she returned home to California and began interning with the Alameda County Board of Supervisors while also working a day job. Shereda regards her internship experience as invaluable and believes that it is a fantastic way to gain practical skills after graduating, although acknowledged it can be financially challenging.

Her first real taste for the public service came through an opportunity in Congresswoman Barbara Lee’s office. Here, Shereda gained valuable knowledge of constituent services. After a little over a year in the role, she moved to the private sector, conducting social policy research and evaluation on different government education programs all over the country, principally those that formed a part of the No Child Left Behind Act. While she was proud of the work that they were doing, she was frustrated at how little attention the government paid to the reports, often completely ignoring their recommendations. This frustration sparked Shereda's desire to return to the public service, where she believed she could better influence decision-makers and make a real impact. When multiple of her friends alerted her to the same job opportunity in the office of a recently elected council member, Libby Schaaf, she knew that she had to apply. Her application was successful and she returned to public service with the city of Oakland to work with then Councilmember Libby Schaaf, and continued on with Mayor Schaaf where she has remained ever since. "The rest is history", she says.

Chief of Staff and Combating Gang Violence

Like many of the professionals the CSA has profiled, Shereda did not grow up with the ambition of becoming a chief of staff. All she knew about the role was from what she had seen and heard of the White House Chief of Staff. The first time she came across someone in the role was while working in Congressman Barbara Lee's office. Shereda described the Congressman's Chief of Staff, Julie Nickson, as very "approachable… someone everybody could work with."

In her current role, Shereda explained that the office's limited budget and small staff required them to be "innovative" to have the greatest impact. During the COVID-19 pandemic, her team implemented barriers along sidewalks in Oakland neighbourhoods to make it safer for the increased number of families and children playing on the streets.

One of the major policies that she is proud of is the City of Oakland's Ceasefire Program. The data-driven strategy coordinates with law enforcement, social services and the community to reduce gang and group-related homicides and shootings. Data collected by the city identified that there are only a small number of violent groups in Oakland and a limited number of those are active at one time. An even smaller percentage of the population was at risk of gang violence. By targeting these groups specifically, the program has had a major impact and resulted in significant reductions in violence.

The program utilises group meetings, community outreach and over-the-phone support to provide mentorship for individuals that are caught up in gang-related activities. Shereda explained that these methods are more effective than ostracising members of the community who have often fallen unwittingly into these situations. The city even employs formerly incarcerated members with similar experiences to mentor those going through the program.

COVID-19 has stifled many of the traditional mechanisms used in Ceasefire. The lack of person-to-person support is believed to have been responsible for a recent spike in gang-related violence. In response, the Ceasefire partners are returning to pre-pandemic methods given California's Shelter in Place changes that can address the challenges imposed by the lack of social connection during the pandemic.

Unrelenting Compassion

Political chiefs of staff are often the public face of the government department they represent. This is an integral part of the role, but it is also one of the most difficult. Shereda often has to face members of the community who feel let down by the system. It is difficult, she says, to not feel personally responsible for the challebges that these people are experiencing. Her philosophy is to “try to treat everyone as if [she] is the one going through it” and to then “figure out who can serve them best and see it through to the end”.

She applies this to any difficulty, great or small, that is being faced by a member of her community. Her commitment to this philosophy is ingrained in her and she has conducted herself accordingly since her first day on the job. In one of her first community town halls, Shereda was confronted by a group of community members frustrated that for years their campaigning for the installation of a stop sign in their neighbourhood had been ignored. While she was only new to the role, she was determined to find the right person who could make it happen. Within a week, the stop sign was up - a small project in comparative terms, but one that had a large impact on alleviating safety concerns for residents in the neighbourhood.

A Planner by Nature

In her personal life, Shereda has to balance her role with her commitments to three young children. The balancing act between the personal and the professional is especially difficult due to the demanding nature of a chief of staff in politics. Shereda says she is fortunate to have such a supportive husband, her “number-one cheerleader,” and is thankful to have a boss that has young children and can empathise with the strains of the role. Working in her hometown of Oakland also means she has access to a strong family network.

Shereda admits that she likes to plan out her life. A year ago she wanted to start holding networking meetings as she enjoys the connectivity that her role requires. The pandemic has put a hold on that for now. The reality for political chiefs of staff, Shereda explains, is that you must be prepared for change and learn to adapt quickly. The role is by deisgn time-limited due to term restrictions. Nevertheless, in whatever she does in the future, she wants to be invested in helping people; pulling together individuals to achieve a common goal. These are skills that she believes are transferable across sectors. At some point she would like to run for office, falling short in her first attempt a few years ago. But in the meantime, she remains open-minded to whatever opportunities present themselves.

Transcribed and Edited by Jeremy Costa, The Chief of Staff Association.

How a New Mentoring Model Can Help Women Close the Gender Gap and Open the Door to the C-Suite

Ms Marcella Allison and Ms Laura Gale

New York Times best-selling authors of "*Why Didn't Anybody Tell Me This Sh*t Before: Wit and Wisdom From Women in Business*

If you're a female chief of staff, then you're probably already familiar with the elephant in the C-suite.

Despite years of effort to close the gender gap, male executives still outnumber female executives seven to one.[1] And male CEOs outnumber female CEOs by a whopping seventeen to one.[2] What's worse, according to a recent Morningstar study, more than half of all companies do not have a single female executive officer. Not one.[3] And the numbers are even more dismal for Black women and women of color.[4]

Despite all our best efforts it seems we're going backwards not forwards.

Caroline Pugh, Chief of Staff to Aneesh Chopra, President of Care Journey and former US Chief

1. Jackie Cook. "The Gender Gap in the C-Suite: A Window on the Gender Gap at the Top of Corporate America and the Case for Better Disclosure," Morningstar. February 17, 2021. https://www.morningstar.com/lp/gender-pay-gap.
2. Naomi Cahn. "Women's Status and Pay in the C-Suite: New Study." Forbes. February 19, 2021. https://www.forbes.com/sites/naomicahn/2021/02/19/womens-status-and-pay-in-the-c-suite--new-study/?sh=2ddd93d43762
3. Cook.
4. Cook.

Technology Officer, offered a new solution. In a recent interview in Forbes, she argued that female chiefs of staff may be our last best hope for closing the gender gap in the C-suite. [5]

“More and more women are the right-hand women to CEOs of major Fortune 500 companies. They are being positioned as the next wave of C-suite executives themselves which is really exciting. The chief of staff role could be the very role that finally evens out the gender disparity in boardrooms.”[6]

While I share Pugh’s hope that a new generation of women might finally enter the C-suite in significant numbers, I’m worried that we’re still waiting for a male CEO to open the door.

Pugh isn’t the first person to suggest that women get a powerful male mentor or sponsor if they want to break into the C-suite.[7] In this top-down model of mentoring, the all-knowing (typically, white male) CEO teaches his female mentee everything she needs to know to succeed in business.

To be fair, research shows that women who are mentored by men make more money, receive more promotions, and report greater satisfaction with their career path, especially in male-dominated industries.[8]

Facebook COO, Sheryl Sandberg, who once served as Chief of Staff to former Secretary of the Treasury Lawrence Summers, comes to mind. As does Amy Cheetham, VP at Costanoa Ventures, who previously served as Chief of Staff to Zuora’s head of North America and Asia Pacific sales.[9]

But there’s a problem with this all-knowing guru model of mentoring.

Unless there is a clear sharing of power, the female chief of staff can end up as “the most overpriced executive assistant ever” according to Dex Hunter-Torricke, former Chief of Staff to Sir Alan Parker, chairman of Brunswick Group.[10] The result is, “You have people who actually could be there to make leadership decisions, and instead they’re picking up sandwiches.”[11]

So instead of being positioned to become the next COO, you end up a glorified sandwich girl.

5. Sarah Coury et al. “Women in the Workplace.” McKinsey & Company. September 30, 2020. https://www.mckinsey.com/featured-insights/diversity-and-inclusion/women-in-the-workplace
6. Marcus.
7. W. Brad Johnson and David G. Smith. “Mentoring Women Is Not About Trying to ‘Rescue’ Them.” Harvard Business Review. March 14, 2018. https://hbr.org/2018/03/mentoring-women-is-not-about-trying-to-rescue-them
8. Aarti Ramaswami et al. “Gender, Mentoring, and Career Success: The Importance of Organizational Context.” Personal Psychology 63, no. 2 (May 12, 2010): 385-405. https://onlinelibrary.wiley.com/doi/full/10.1111/j.1744-6570.2010.01174.x
9. Anna Kramer. “Everybody Wants a Chief of Staff, Even When They Don’t Know Why.” Protocol. October 09, 2020. https://www.protocol.com/chief-of-staff-tech-company
10. Kramer.
11. Kramer.

This is why I believe we need a new model of mentoring that avoids this trap...

Because research shows the old top-down view of mentoring no longer serves women in our diverse and fast-moving business environment.[12]

First, a good male mentor is quite literally hard to find. In the aftermath of #MeToo, LeanIn.org/McKinsey reports that fewer men are willing to mentor women.[13]

I was shocked when good, decent men I work with, suddenly started asking me if I could join them for dinner with their female mentees, as if I was some kind of Victorian chaperone. They tell me they are afraid of being falsely accused.

When you factor in the 17 to 1 odds that the CEO is a man, this unintended backlash means that women have even less access to high-level mentors.

Second, even when good men are willing to mentor women, these men often see themselves as the "white knight" riding to our rescue.[14] As Jennifer de Vries points out in her research, this just reinforces the stereotype that a woman needs a powerful man in order to lead and that we cannot succeed on our own.[15]

Third, the top-down all-knowing male guru model of mentorship just isn't scalable.[16] It might work for a few key women, but it leaves the majority of us without a mentor and without the support we need to succeed. [17]

Finally, even if you are lucky enough to find a high-level mentor, it's unreasonable to expect that one person will be able to address all your mentoring needs both personally and professionally. Especially when that high-level mentor is already overcommitted with other duties and responsibilities. [18]

So, what does work?

Two new mentoring models have emerged that, when combined, provide a powerful alternative to the old top-down guru-based model – especially for women.

The first is called network-based mentoring. It was developed by Dr. Kerry Ann Rockquemore,

12. Kerry Ann Rockquemore. "A New Model of Mentoring." Inside Higher Ed. July 22, 2013. https://www.insidehighered.com/advice/2013/07/22/essay-calling-senior-faculty-embrace-new-style-mentoring
13. Lean In. "How Men Can Support Women at Work." January 2018. https://leanin.org/mentor-her
14. Johnson. "Mentoring Women Is Not About Trying to 'Rescue' Them."
15. J.A. de Vries. "Champions of Gender Equality: Female and Male Executives as Leaders of Gender Change." Equality, Diversity and Inclusion 34, no. 1 (February 09, 2015): 21-36. https://www.emerald.com/insight/content/doi/10.1108/EDI-05-2013-0031/full/html
16. Rockquemore. "A New Model of Mentoring."
17. Rockquemore. "A New Model of Mentoring."
18. Rockquemore. "A New Model of Mentoring."

Founder of the National Center for Faculty Development & Diversity. She created it to help women and people of color transition better toward tenure. [19] And it can help female chiefs of staff transition better into their new role too.

In network-based mentoring, the female mentee works with her mentor to identify the specific skills and connections she needs to succeed. Then her mentor helps her to build a broad and deep network of mentors to meet those needs. [20] The result is more like a mentoring roadmap than a white knight on a horse.

Network-based mentoring encourages all of us to take responsibility for our success and to ask for what we need from the mentoring relationship. This can be uncomfortable at first because many of us were not taught to network. [21]

Men teach other men that mixing business and friendship is how you get ahead. As a result, men tend to network with a clear goal in mind and they are not afraid to ask for what they want.[22] Women have a harder time asking. Network-based mentoring pushes us to get better at asking.

If you are a new female chief of staff, you can use this network-based mentoring model to create a list of your key mentoring needs. Then you can sit down with the CEO and identify other senior executives who can help you fill in these gaps. That way you're not waiting on the CEO to provide everything you need to successfully transition into your new role.

In addition, as a key connector between the C-suite and the rest of the staff, you're in a unique position to help other executives create their own mentoring roadmap and connect them to potential mentors across the entire company.

Instead of waiting for the perfect unicorn of a mentor to appear, everyone can start filling in their own mentoring gaps one conversation at a time across a broad network of experienced leaders. As a result, the company moves forward faster.

The second alternative to the old-school top-down mentoring approach is *co-mentoring* or *reciprocal mentoring*.[23]

In reciprocal mentoring *both* the mentor and mentee bring their own insights, life experience, and skills to the table. Reciprocal mentoring isn't about a bunch of mentees sitting at the feet of the mentor guru. Instead, it's about humility, shared power, and a willingness to listen. [24]

19. Rockquemore. "A New Model of Mentoring."William Ford. "Tenure Crusader." Diverse. January 11, 2011. https://diverseeducation.com/article/14598/
20. Rockquemore. "A New Model of Mentoring."
21. Caroline Castrillon. "Why Women Need to Network Differently than Men to Get Ahead." Forbes. March 10, 2019. https://www.forbes.com/sites/carolinecastrillon/2019/03/10/why-women-need-to-network-differently-than-men-to-get-ahead/?sh=58757594b0a1
22. Castrillon. "Why Women Need to Network Differently Than Men to Get Ahead."
23. Johnson. "Mentoring Women Is Not About Trying to 'Rescue' Them."
24. Johnson. "Mentoring Women Is Not About Trying to 'Rescue' Them."

The payoff is worth it. Research shows that reciprocal mentoring boosts productivity, increases fulfillment, and provides opportunities for growth for both partners. [25] It also has greater lifelong impact than traditional top-down mentoring. [26]

Reciprocal mentoring can also help men and women get comfortable with co-ed mentoring in the wake of the #MeToo movement because co-mentoring is about shared power, not hierarchy. Both men and women who participate in reciprocal mentoring are more resilient, have clearer priorities, and enjoy more satisfaction in work-life balance. [27/28]

Reciprocal mentoring can lead to greater gender equality in the C-suite as well.[29 30]That's good for the bottom line. Because organizations with greater diversity and support for all staff, enjoy a statistically significant boost in profitability and performance.[31]

For female chiefs of staff, reciprocal mentoring can help you avoid the "sandwich girl" trap. It creates a strong partnership with the CEO and makes it easier for you to use your power and influence to lead from behind.

As a female chief of staff, you're also in a unique position to use your influence to create mentoring programs and initiatives that benefit all women. Because before we can close the gender gap in the C-suite, we must first close the gender gap when it comes to mentoring.

A survey from Development Dimensions International, a global leadership consulting firm, discovered that less than 4 in 10 female executives have ever had a formal mentor. [32]

And it's not that women aren't willing to be mentors, they are. Over 70% of women said they would be willing to mentor women at work. [33]

So why aren't they?

Women are not asking for a mentor and often they don't see themselves as a mentor to other women. [34] One of the reasons men typically have more mentors and also mentor more, is because they ask, and are asked. [35]

25. Johnson. "Mentoring Women Is Not About Trying to 'Rescue' Them."
26. B.R. Ragins. "Relational Mentoring: A Positive Approach to Mentoring at Work." Oxford Handbooks. August 2011. https://www.oxfordhandbooks.com/view/10.1093/oxfordhb/9780199734610.001.0001/oxfordhb-9780199734610-e-039
27. Ragins.
28. Reciprocal Mentoring Lab. "Equipping Men and Women to Mentor and Sponsor More Confidently through Reciprocal Mentoring." 2021. https://reciprocalmentoringlab.com/
29. Lean In. "How Men Can Support Women at Work."
30. Johnson. "Mentoring Women Is Not About Trying to 'Rescue' Them."
31. V. Hunt et al. "Delivering through Diversity." McKinsey & Company. January 18, 2018. https://www.mckinsey.com/business-functions/organization/our-insights/delivering-through-diversity#
32. Stephanie Neal, Jazmine Boatman, and Linda Miller. "Women As Mentors: Does She or Doesn't She? A Global Study of Businesswomen and Mentoring." Development Dimensions International (Publisher). 2013. Source info from email. https://www.shrm.org/ResourcesAndTools/hr-topics/employee-relations/Documents/womenasmentors_rr_ddi.pdf_ext=.pdf
33. Neal.

One way you can encourage more women to engage in mentoring is to use your position to create a formal structure that promotes these relationships. You can also help to build a culture that encourages seeking help and giving support.[36/37]

As a female chief of staff, you can also reach out to more junior women in the organization. It's critical that these women have access to the organization's more powerful women, particularly in male-dominated fields.[38] As Sian Beilock, President of Barnard College and a cognitive scientist, explains, "*Research shows that when women are exposed to powerful female role models, they are more likely to endorse the notion that women are well suited for leadership roles.*" [39] In other words, when women see you as a leader, they begin to see themselves as leaders.

The ultimately helps to close the gender gap in the C-suite. In fact, organizations that encourage or require senior executives to mentor women report the highest percentage of women at the executive level.[40]

There is one final critical connection women need in order to close the gender gap in the C-suite.

And it's not what you might think...

Recently a group of researchers followed a bunch of brand new bright-eyed MBA graduates. They looked at their networking skills and then they compared them to their job-placement results. [41] They were shocked at what they discovered.

For men the secret to landing the best jobs with the biggest paychecks and greatest authority was being super connected to a lot of other highly connected people.[42] But for women, being central to a highly connected network wasn't enough. The most successful women also needed something else.

Women needed an "old girls' club" in order to succeed at the highest level in business. [43]

34. ResearchGate. "The Guiding Hands Mentoring Women." September 2009. https://www.researchgate.net/publication/291461108_The_guiding_hands_mentoring_women
35. Neal. "Women As Mentors: Does She or Doesn't She? A Global Study of Businesswomen and Mentoring."
36. Sarah Dinolfo and Julie S. Nugent. "Report: Making Mentoring Work." Catalyst: Workplaces that Work for Women. January 19, 2010 https://www.catalyst.org/research/making-mentoring-work/
37. Neal. "Women As Mentors: Does She or Doesn't She? A Global Study of Businesswomen and Mentoring."
38. Nilanjana Dasgupta and Shaki Asgari. "Seeing is Believing: Exposure to Counterstereotypic Women Leaders and Its Effect on the Malleability of Automatic Gender Stereotyping." Journal of Experimental Social Psychology 40. no. 5. September 2004: 642-658. https://www.sciencedirect.com/science/article/abs/pii/S0022103104000253?via%3Dihub
39. Siam Beilock. "Research-Based Advice for Women Working in Male-Dominated Fields." Harvard Business Review. February 13, 2019. Updated March 03, 2019. https://hbr.org/2019/02/research-based-advice-for-women-working-in-male-dominated-fields
40. Neal. "Women As Mentors: Does She or Doesn't She? A Global Study of Businesswomen and Mentoring."
41. Yang, Nitesh V. Chawla, and Brian Uzzi. "To Land Top Jobs, Women Need Different Types of Networks than Men." KelloggInsight. March 01, 2019. https://insight.kellogg.northwestern.edu/article/successful-networking-men-women
42. Yang.
43. Yang.

According to the study coauthor Brian Uzzi, that's because men and women need different information to succeed. Men need access to more public information like who is hiring and what you need to know to apply.

But women need more.

Women need a second women-only peer group that can provide insider information about a company's culture and attitude towards female executives, as well as advice about how to survive and thrive in a male-dominated industry.[44]

"You need that private information to understand how to negotiate within a world where you're being held to different standards."[45]

That private information is worth its weight in gold to women looking to break into the C-suite. In fact, women in the study who had a second female-only inner circle went on to land jobs with nearly triple the salary and authority than women who relied only on their co-ed network.[46/47]

If you want to succeed in what is statistically a male-dominated C-suite environment, you need to build your own women-only inner circle. Then you can use that female network to help recruit other women to the chief of staff role. In fact, that's exactly what many female chiefs of staff are already doing today.[48]

While I have never been a female chief of staff, I have spent most of my career as a woman in male-dominated industries. First as a business manager for an international contemporary art gallery in the early 90s, then as a venture capitalist in the early 2000's, and finally for the past fifteen years as a copy chief and copywriter for some of the largest online marketers.

Seven years ago, I founded a female-only mentoring collective for marketers, entrepreneurs and copywriters. I have personally road-tested all of the advice in this article in the Titanides Mentoring Collective.

In the Titanides we use a combination of reciprocal and network-based mentoring to help more women grow and succeed in business. To help facilitate this process, I invested in a program called MentorCloud that links women with female mentors in key areas much like a dating platform and includes specific actions, steps and feedback loops proven to make the mentoring relationship more effective.[49]

44. Yang.
45. Yang.
46. Yang, Nitesh V. Chawla, and Brian Uzzi. "A Network's Gender Composition and Communication Pattern Predict Women's Leadership Success." Proc. Natl. Acad. Sci. January 22, 2019. https://doi.org/ 10.1073/pnas.1721438116. https://www.pnas.org/content/116/6/2033
47. Yang.
48. Marcus. "Are You Ready to Become Chief of Staff?"
49. https://www.mentorcloud.com/

The results have been extraordinary. Not only are women finding access to more jobs, but they are receiving mentoring on exactly how to apply for those jobs, how to negotiate pay increases, how to bid contracts, and much more. Our mentoring program is designed to help close the gaps between male and female entrepreneurs.

I've seen firsthand the results this kind of facilitated women-only mentoring and networking can have in the male-dominated world of internet marketing. And I believe it can have a powerful impact on female executives and women in the chief of staff role as well.

*As a thank you to all the women who are currently blazing a new trail to the C-suite, I wanted to share some of our collected wit and wisdom from female entrepreneurs in the Titanides Mentoring Collective with you. You can download a free copy of our book, cheekily titled, "Why Didn't Anybody Tell Me This Sh*t Before" at www.talesfromthetop.com. There's no charge, this is a gift from our female-only network to you in the hopes it might inspire you to start your own. In the meantime, feel free to join us. We'd love to have you.*

Marcella Allison is the founder of the Titanides Mentoring Collective, an organization dedicated to helping female entrepreneurs, marketers and copywriters succeed at the highest level in the direct response industry. She is also a top direct response copywriter herself who has generated over a hundred million in sales for her clients. And she is an in-demand mentor and copy chief for the next generation of copywriters.

Laura Gale is a ghostwriter and writing coach. She works with entrepreneurs from all over the world to publish stories that leave a legacy. Laura is also a bestselling author in her own right and is based in Europe.

“Put The People First”

A Profile of Mayor Hardie Davis Jr. and Chief of Staff Petula Burks

Mayor of Augusta, Georgia (2015 - Present)
Chief of Staff (2020 - Present)

“If you care more about the work than you do the people, you will abuse the people while trying to do the work.”
- Mayor Hardie Davis Jr.

The People are the Work

Mayor Davis deeply believes in progress and the ability to use government as the vehicle to achieve progress. However, where he differs from many leaders and politicians is that he does not lose sight of who that progress is meant to serve, the people. When it comes to progress, too often society subscribes to the adage of ‘do the ends justify the means?’ and use that as justification for their work. Mayor Davis subscribes to no such adage because in his eyes to advance an agenda that leaves the people behind is to work in service of yourself instead of the people who you were elected to serve.

In order to effectively work in service of the people, Mayor Davis points out that one must possess “the ability and the wherewithal to know when to play the part of a diplomat and when to play the part of a pugilist.” To be able to be both a person who can deal with people in a sensitive and effective way as well as be a fighter or boxer, is a seemingly impossible dichotomy to try and balance. Yet, Mayor Davis affirms that is the job of a leader and their chief of staff if they intend to promote meaningful progress for their people.

The Values You Have

Hardie Davis Jr. was born in Macon, Georgia and grew up in a family of four. From a young age, his parents instilled the values of “caring for others and to value the company you keep.” Speaking about his parents, he considers himself fortunate that they are both still alive and well, even in the midst of a global pandemic, and “ensuring that he does not stray from the values they instilled in him as a child.” It is because of these values that Mayor Davis considers his journey and the success that has come with it to be “rooted in the people.”

Growing up Hardie Davis Sr. worked for Georgia Power which exposed Hardie Jr. to the STEM field. However, he always differed from his father in one key aspect “[I] was not interested in how to power things, but rather how to make things work,” a notion that would prove to be a precursor for his journey to success. Mayor Davis pursued his undergraduate degree in electrical engineering from Georgia Tech, one of the top engineering schools in the country. Mayor Davis looks back fondly on his time at Georgia Tech, crediting the school and its international student body as “helping to shape [my] world view by providing [me] with touchpoints to people from all walks of life." As interested as he was in engineering though, Hardie Jr's values always pointed him to his true passion, caring for others. It is for this reason that later in his life Hardie would go on to receive a Doctorate in Ministry from the Christian Life School of Theology.

Serving the People

Upon graduating from Georgia Tech, Hardie went on to pursue a career in engineering. He would wind up spending twenty-four years working as an engineer and experienced great success doing so, yet his passion for "caring for others" would ultimately compel him to leave his field of study and begin serving the people his journey and values were rooted in.

Mayor Davis started in the Georgia State House of Representatives for two years before quickly making the switch to the Georgia State Senate which he served in for six years. It was during this time that he was first exposed to the chief of staff role and greatly valued the ability of a chief of staff to have a bird's eye perspective of all the touchpoints between stakeholders. Speaking about the personality of a chief of staff, Mayor Davis described them as "observational learners" who are "knowledgeable and insightful" and in terms of the Georgia State Legislature had an awareness of the dichotomy between policy initiatives and the budget.

Mayor Davis, though, "did not want to be a career Atlanta person" and so after eight years in the Georgia State Legislature, he decided to run for Mayor of Augusta and won in a landslide. As mayor of the second-largest city in the state of Georgia, which has also been the state capital twice before, Hardie contends that "wisdom, not experience, is the best teacher." His reasoning for this is rooted in what he admires about chiefs of staff, the ability to be an observational learner and glean best practice based on what has and has not worked for others in similar positions.

Late into his second term he was in the middle of looking for a new chief of staff and a colleague introduced him to Ms Petula Burks.

Petula is a native of Athens, Georgia and received her degree in broadcast journalism from Brenau University. However, Petula did not use her degree to pursue a career in journalism; instead, she got her first job out of school as the Public Affairs Director for a Miami Dade County Commissioner. After a few years serving in this role, Ms. Burks actually moved back home to Georgia and continued using her public relations skills at the Georgia Department of Transportation. Upon leaving the department, she pivoted and became a teacher for a few years. "[Teaching] ironically, taught me a lot, especially how to deal with brutal honesty. My students were painfully honest and I learned how to keep my composure, restructure a lesson in a quick minute, and still impact their lives in a meaningful way." Petula would utilise the lessons she learned upon her return to government as a Public Affairs Officer and ultimately as the Director of Public Affairs for Miami Gardens where "[she] rolled up her sleeves and went to listen to the people about the work that needed to be done." To accomplish the work, Petula noted that sometimes you had to bring the fight to the people or things standing in your way, but not in a way that would humiliate anyone you defeated; otherwise known as the velvet hammer.

Ultimately, this is what Mayor Davis valued most in his chiefs of staff, "the ability to be both a pugilist and a diplomat." Not only that, but he felt Petula was someone who understood his principle of “the people are the job, not the work.” As such, he told Petula he wanted her to come to Augusta with him to be his new chief of staff.

When Petula arrived in Augusta she quickly learned that the second-largest city in the state of Georgia actually did not have a communications department, and so from the very beginning she took it upon herself to act as the communications department as well as the chief of staff. Managing such a large workload “proved to have its bumps” but she learned “how to let go and delegate.” As chief of staff, Petula has worked with Mayor Davis on a series of projects. The project that best highlights their commitment to the people is their fight against homelessness in the city. With the support of their team, Petula and Mayor Davis have put together a white paper on best practices to fight homelessness which is now being utilised by cities across America.

During Mayor Davis’s now nearly six years in office, the city of Augusta has transformed into much more than “just where the Masters Golf Tournament is played.” Significant accomplishments include making Augusta the cybersecurity capital of the world, reducing unemployment to under four per cent, reaching the highest bond rating in the city’s history and creating complete transparency on the spending of government funds. Under the stewardship of Mayor Davis, and with the support of Petula and the rest of the team, Augusta is now an international city that serves as a home of opportunity for everyone, as well as the home of the Masters and the Godfather of Soul, James Brown.

Transcribed and Edited by Baxter Potter, The Chief of Staff Association.

“Strength in Partnership”

A Profile of California State Controller Betty Yee and Chief of Staff Karen Greene-Ross

California State Controller
Chief of Staff to the State Controller

California State Controller Betty Yee and her chief of staff, Karen Greene Ross, exemplify the power of an effective relationship between a chief of staff and principal. Hailing from diverse backgrounds and with different leadership styles, the strength of Betty and Karen’s partnership is born out of their complementarity, not their similarity.

The California State Controller is one of the most powerful figures in global finance, with jurisdiction over what would be the fifth-largest economy in the world if it were a sovereign nation. The State Controller’s office has fiscal control over more than $214 billion of budgeted public funds, over $50 billion a month in borrowable funds and serves as the state’s independent fiscal watchdog. The Controller also has broad policy reach, including her role as a board member of the country’s two most significant public pension funds and several financing authorities.

There is perhaps no greater example of the crucial role of a chief of staff, and the importance of the relationship between a COS and Principal.

Betty’s Journey from Small Business Bookkeeper to State Controller

Betty is a native of San Francisco, a daughter of immigrant parents who moved from South-Eastern China to the United States. Her family owned and operated a laundry and dry-cleaning business. She was introduced to the world of finance at a young age, acting as the business bookkeeper at just seven years old. She managed all the family’s expenses, and with six kids to feed, the money was often tight. It was life’s introduction to handling a business.

At thirteen, Betty was responsible for delivering a message to the local San Francisco school board on behalf of four Chinese-American families in the neighborhood. Convening to discuss the implementation of a bussing program, she delivered a message of support for its goals. It was a significant initiative for the families of small businesses, who often lacked a vehicle license and, with seven-day working weeks, would be required to use public transport to get to their children’s school if an emergency arose.

She fought off nerves and delivered the critical message to the board. The program was subsequently implemented. It was an achievement that made a significant impression on her - a realisation that she was a voice for someone. Even now, she remains committed to ensuring that a range of voices are being heard and believes strongly in the positive impact of diversity on effective policymaking.

In her early days of schooling, Betty was active in student government and knew that she wanted to work in the public service. At graduate school in California, she honed her already developed finance skills, focusing on case studies of local government policy responses in light of severely curtailed property tax revenues due to California's enactment of Proposition 13.

She then went on to work as a senior staff member to several policy and fiscal committees in both houses of the California legislature, followed by a two-year stint as the chief deputy and chief of staff to her predecessor on the state's tax commission. Her experience working in a chief of staff role impressed upon her the need to be several steps ahead of the principal. Notably, she was always aware of trending events and carefully considered how they might affect and influence her work.

After varied high profile experiences in the California Department of Finance as Governor Davis's Chief Deputy Director for Budget and as an elected representative on the State Board of Equalization, Betty assumed the role of State Controller in 2015 and has never looked back.

Discovering her Purpose - Karen's Journey to Chief of Staff

Karen grew up in Atlanta, Georgia and attended college in Florida before following her family to Los Angeles, California. Her post college jobs in finance, customer service and securities, left her unchallenged and uninspired.

So she decided to go to law school and got her Juris Doctorate from Loyola Law School in Los Angeles. After law school, she clerked for a bankruptcy judge and enjoyed the combination of law and business. She worked as an attorney, practicing bankruptcy and state law at Perkins Coie's Los Angeles office - a challenging and fast-paced role but one that still left her uncertain about this career track.

Karen remained on the lookout for a role more suited to her interests and personality. Even before entering public service, she had a keen interest in politics and regularly read about critical state issues. However, her introduction to the role of a chief of staff occurred more by chance than by design. While attending an event with other former law clerk friends, Karen overheard a conversation that a friend's fiancé was having with another guest that changed her life. He friend's fiancé was a chief of staff for a newly elected California state assembly member and he was discussing an opportunity within the office to work as a committee consultant.

After signaling her interest in the role, things moved quickly. Karen flew to Sacramento to interview for the position. She was excited to accept the offer to serve as the Chief Consultant for the Assembly Banking committee given the variety of issues and people she would interact with in this role. Once offered the job, she made the bold decision to move to Sacramento, leaving her friends and family behind.

From there, she worked in various legislative and fiscal policy roles. She worked as a senior policy consultant in both houses of the California legislature, for Governor Davis as Legislative Director for the Business, Transportation and Housing Agency, for Governor Brown as Assistant Chief Counsel for the California High Speed Rail Authority, and as Deputy Controller of Investments for former Controller Steve Westly, before assuming her current role in 2015.

A Relationship Founded on Respect

Betty and Karen's relationship originated in the 1990s where they met while working as staff members in legislative policy committees. Their first project together was to address issues that contributed to Orange County's bankruptcy. With Karen's background in bankruptcy law and Betty's experience in local government finance, together, they helped devise a plan that included long-term revenue pledges and changed state law requirements for government investment options.

Since they reunited as State Controller and Chief of Staff in 2015, their relationship has gone from strength to strength. As chief of staff, Karen deals with a vast array of issues that emerge on any given day. Betty explained that Karen is highly proficient in distilling the information that she needs to hear. She "sets the tone of how we operate". Her work has contributed significantly to their reputation of being problem solvers that "don't let things languish". Karen explained that her background in law has helped her remain calm in the face of unprecedented issues. She half-jokingly notes her experience as a parent has been helpful as there are occasions where she has felt like she needed to act like a parent. Every person on their staff has a different skillset and adds something of value to the team as a whole. It is Karen's job to hear, understand and know to deploy these skills to different situations.

Karen says she could not do her job without their team of incredible staff, including those they recruited and those that were here when Betty's tenure began. She credits this to Betty's leadership and personality, which helps them attract and retain talented staff. Betty's energy and empathy are ever-present. She cares deeply about her constituents and uses this to guide policy development and implementation at every step. Karen has a more assertive personality and leadership style, while Betty is soft-spoken but clear, confident, articulate, and highly adept in diplomacy.

In combination, their diverse personalities work in sync and allow them to elevate the skills of their staff. Betty and Karen have also developed some guiding principles, which drive their approach to their positions. Perhaps the most important of these is collaboration. Many of the issues that they deal with are interrelated, and it is only through partnership that they can best devise a solution. Betty strongly believes in the philosophy "do not work in silos". Each of their senior staff's work is enhanced by purposefully sharing the important issues of what is happening across business functions. Both believe it is mutually beneficial for senior staff to discuss key cross cutting issues and get input from diverse perspectives.

Betty notes how important it is to always remain present and visible, particularly in an executive role. However, she also stresses the importance of delegation; and revealed it was one of the most difficult skills that she has had to develop. Significantly, Betty emphasises that even when delegating, you should remain present and aware of the work and perspectives of your staff.

Ultimately, Betty believes the most crucial leadership attribute is to be authentic. Vulnerability demonstrates empathy, and empathy creates a greater connection with constituents.

Trailblazing Women of Influence

Betty and Karen are high-profile female leaders in an industry that is still a male-dominated field. While women are still underrepresented in politics, Betty speaks often on the need to re-think the way we assess women's viability to serve in these types of roles. For example, when running for statewide office, most people judged her suitability on how much money she could raise. Moreover, in 2014, she entered her campaign as the underdog. Still, she was supremely confident in her ability to do the job and put all her energy into gaining the trust and confidence of voters.

To instill real change, Betty thinks women need to define the rules of the game and not be dictated by them. "Women often undervalue their own experience and what they can bring to the table". After all, equal gender representation leads to a broader lens through which we view how policies will affect the community.

Karen has seen first-hand the challenges that women in politics uniquely face. In particular, she recalled a specific board meeting where she called out one of the members for constantly interrupting Betty while she was talking. Nevertheless, Karen looks to the fantastic female leaders emerging in politics as evidence of the growing prominence of women in the industry. New Zealand Prime Minister Jacinda Ardern, German Chancellor Angela Merkel and recently elected US Vice President Kamala Harris are all incredibly effective leaders in their own right who exemplify the value of female voices in politics.

Commitment to Public Service

In a globalised world where the private sector has become an enticing prospect for young people entering the workforce, Karen and Betty explained why working in the public service is an exciting and rewarding career. Karen believes that young people are increasingly concerned about the multitude of problems facing the world, and a career in public service allows them to help address these challenges.

Betty noted that it is only in the public service that you can experience the intersection of issues all in one place. In an era of finite resources, young people will need to lead the charge in finding more effective, efficient and sustainable ways to deploy financial resources. It is not only about the issues we are facing today, she says, but also about having the ability to influence what their futures will look like sustainably.

Transcribed and Edited by Jeremy Costa, The Chief of Staff Association.

“Just Be It”

A Profile of Dr Alice Jacobs and Ms Cherie Kono

Founder and CEO of Convergence Group
Chief of Staff

The Plight of Brilliance

When Albert Einstein met Charlie Chaplin, Einstein said, “What I admire most about your art, is your universality. You don’t say a word yet the whole world understands you!” To which Chaplin replied, “It’s true. But your fame is even greater: the world admires you when nobody understands what you say.”

Therein lies the plight of brilliance; you have the power to change the world, yet, so few can understand why or how you’re going to do so. Ultimately, navigating this Catch-22 is not the responsibility of the extraordinary, but rather it is the responsibility of those who have dedicated their lives to work for them.

An Unexpected Path

Dr Alice Jacobs’ father served under almost every president from Gerald Ford to George W. Bush. He was critical in exacting tremendous change and achievements for the United States, yet most people have never heard his name. Mr. Jacobs served on the National Commission for the Review of the National Reconnaissance Office (NRO), the General Advisory Committee on Arms Control and Disarmament, the Defense Policy Board to advise the Secretary of Defense among others. Jacobs was also the chairman of the Jacobs Panel, which conducted a bottoms up review of counterintelligence policy. Similarly, Dr. Jacobs has already exacted significant impact and achievement in the health technology space. Yet, the wider public is not aware of who she is or what she has accomplished.

It is often said that necessity is the father of invention; however, when it comes to the medical field, the better expression may be ‘tragedy is the father of invention,’ something Alice can attest to first-hand. Initially, she had planned to study neuroscience, go to medical school and forge her career as a doctor, but that all changed when a patient she was overseeing came in for routine surgery and later died of an infection. This tragic event caused Alice to realise that there was technology out there that could decrease the turnaround time testing for infection, “but it was not being used in a clinical setting.” Thus, as a third-year student, Alice “went on a mission” to solve this problem. Her solution, a company that got eight products through the FDA, shipped multiple products to five different continents, and achieved thirty different clearances globally and effectively decreased the turnaround time for testing infections, saving countless lives worldwide.

A New Mission

After achieving tremendous success by going into great depth within the diagnostic space, Alice was eager for a greater breadth of knowledge. Alice took up residence at several venture funds including Third

Ventures and GE and slowly migrated herself back to Los Angeles. Here, she met for lunch one day with one of her first mentors, Dr. David Baltimore, who asked her if she had spent any time at Caltech. The result of this lunch created an opportunity for Alice to become the Entrepreneur-in-Residence at Caltech and the only medical doctor on campus. The time spent at Caltech with Nobel Laureates, National Academy members and some of the great living experts in data science “completely changed my view of the world and put me on my current path.”

The path which Alice was set on is “ to fundamentally change our collective approach to medicine to be proactive, not reactive.” The world has gone through a golden age of data, giving us access to information and insights that used to be unthinkable but now could allow us to proactively address healthcare from the point of knowledge. As such, Alice intends to utilise “knowledge and data-driven solutions to reroute the course of care for patients around the world.” Dr. Jacobs maintains, however, that “the most important aspect is not the data or the insights but whether you can utilise that to empower people to engage and take action.” Ultimately, this is where Alice and her company are focusing their efforts,“how can you leverage data and technology to establish a trusted relationship between consumers and businesses to drive effective engagement?”

Understanding Brilliance

The difference between changing the world and not changing the world lies in one’s ability to articulate a compelling story. Alice believes her company, Convergence Group, has such a story. The problem with a compelling story, though, is that it creates incredible amounts of inbound interest, which left Alice with a dilemma; how could she keep her eye on the future and achieve her vision for the company while simultaneously managing the present. Alice concluded that she needed someone who could help her manage all the inbound interest while at the same time amplifying her story and message. She needed a chief of staff.

Finding a chief of staff is not an easy task because it is paramount that the principal considers someone who understands and aligns with them professionally and personally. Then once you factor in that the principal, Alice, is one of the leading experts at the intersection of health and data and her peers consist of some of the most prominent global leaders and subject matter experts, the task becomes nearly impossible.

Fortunately, for Alice, during the interview process, there was one candidate who stood out as “having the power to understand the why and how of my mission and ability to amplify it,” that candidate was Cherie Kono. Speaking about the process, Cherie told us, “even after they had extended an offer to me, I requested further interviews because, to conduct this job exceptionally, I needed to know without a shadow of a doubt that we were aligned when it came to the mission.” Alignment on the mission is of utmost importance for a productive COS-principal relationship. A chief of staff’s singular function is to make their principal as efficient and effective as possible in accomplishing their mission. To do so requires a chief of staff to act as a thought partner for their principal and have the ability to have tough conversations with their direct reports and especially their principal.

In speaking with Cherie and Alice, the alignment of their professional and personal beliefs was palpable, with Alice even saying that as introverts, they can "see each other." One idea they spoke of, which has led to success, is that Alice believes in "moving beyond constraints and just operating." Cherie and Alice do not perceive that they have an uphill battle to succeed in the business world because they are women. Instead, they have wholly rid their minds of that notion because they do not want to "create mental obstacles to their success." Alice has a sign above her desk that simply reads "Be It" to remind her that the only obstacle to achieving success is oneself.

Alice and Cherie's relationship is the bedrock for their success and allows Cherie to have tough conversations with Alice when need be. Recalling one such conversation, Cherie described Alice as the type of manager who likes "to reward good work with more work", and so early on in her tenure, she had to talk to Alice about creating a better process for load management, so none of their employees got burnt out. Alice [who was laughing as Cherie recalled the story] was highly pleased to have this insight from Cherie as "on her team self-care is a must because an empowered employee is an effective employee."

However, the scope of Cherie's job is much more than just having the occasional tough conversation with Alice. As chief of staff, Cherie sits at the centre of the bidirectional flow of information, acting as the single funnel for all the inputs and outputs of her principal. Because of this function, Cherie focuses on the importance of having a "three hundred sixty degrees perspective" so you can "identify blind spots and see around corners" for your principal. Ultimately, Cherie can manage the present which allows Alice to stay focused on her vision for the company's future.

Transcribed and Edited by Baxter Potter, The Chief of Staff Association.

Rethinking the Dichotomy Between Order and Change

Ms Charlene Li
Senior Fellow at Altimeter, speaker and New York Times best-selling author

We humans are a curious creation, a study in contrasts and contradictions. Take, for example, how our nature pulls us in two polar directions, one towards order and stability and the other towards change and growth.

On the surface, it appears that these forces cancel each other out but dig deeper, and you soon realise that they need each other to exist. When we stay in one place for a while, restlessness sets in, and we ache for serendipity. Similarly, when we've been on the move, fatigue hits us, and we long for a place to sit and catch our breath.

For the past year, we've all experienced the dichotomy of order and change. In just a few days, our organizations underwent a massive pivot as we shifted to pandemic operations, a change that we would have considered madness and impossible previously. As we cobbled together a new order, the monotony of living under a lockdown caused us to crave even the briefest encounter with a new person. And as we head into the post-pandemic era, we cling to our pandemic life routines while tentatively taking the first steps to explore what it means to live and work in the new "normal."

Let’s dig a little deeper into order and change to understand their benefits and understand their dark sides.

As leaders, we’ve learned that success comes with order – stand in a straight line, put your toys away, get your homework done, deliver results on time and on budget. Do all these things, and you’ll be rewarded. Things operate as expected when there is order, and it fulfills our instinctual need for safety and security.

But order’s dark side is that too much of it beats improvements and innovations out of the system. Change, even the most incremental little spark, can be perceived as a threat to order and gets stamped out before it has any chance of catching fire. The result is an organization so brittle that even the slightest breeze of change from the outside threatens to break it apart.

In contrast, we also know rewards come when we improve, grow, and change. There is excitement in the new, and it gives us hope for the future. And there’s also the adrenaline rush that comes from having tried something new and not only survived it but triumphed!

But change also has a dark side. Change feels awful, especially when it happens so quickly that we don’t have a chance to adjust our perception of where we stand in the new world. We feel disrupted when the power in our relationships shift, and we won’t feel settled again until bonds and connections get re-established and normalised. Change can spiral out of our perceived control resulting in so much dissonance that it overwhelms us and leads to exhaustion. It’s not that we don’t want to change but that we want some predictability and stability.

Order and Change: Two Sides of the Same Coin

My research examines how disruptive leaders and their organizations not only survive disruption but thrive with it. We imagine that these disruptive organizations are hotbeds of disorder, a chaotic workplace where brilliant minds concoct innovations in the middle of the night.

What I found is just the opposite. These disruptive organizations embrace the seemingly contradictory ability to live with both order and change rather than swinging wildly between them. They create just enough order to ensure that change – even highly disruptive change – happens smoothly so that they don’t become victims of change fatigue.

Disruptive organizations invest heavily in structure, process, and policy to clarify and align how change will happen. They address the dark side of change – most notably the sense of disorientation and the fear and anxiety that comes from uncertainty – by creating processes that define and preserve relationships.

Processes include addressing issues such as who needs to be involved – or doesn’t – and who decides. They establish norms when it’s essential to come to a consensus versus when disagreements must surface alternatives. And they make clear what the consequences of both successes and falling short are to minimise surprises and create safety and stability for everyone at the start of the journey. As a result, they spend minimal energy on the change process itself and instead focus their attention on the future and the tasks needed to achieve it. For example, at the start of every project at Amazon, the team writes a one-page press release from the future, describing the problem the proposed product or service will solve, along with six FAQ pages that lay out details about how customers will use it.[108] The team might spend weeks creating and refining that press release, but by the end of the exercise, they walk away with a crisp, clear explanation of how the project will help customers.

This approach forms the innovation infrastructure for Amazon—every proposal for a new product or service follows this format. It ingrains the leadership principle "be customer-obsessed" into the innovation process by starting with the end customer experience and working backward to today.

The Discipline of Disruption

Amazon and disruptive organizations like it all have one thing in common – they bring discipline to disruption and growth. And you can as well – the solution is simple, but that doesn't make it easy. There are three ways to impose order to drive exponential change.

The first is to **invest in openness** to create trust and accountability. In an open organization, your success and failures become readily available to everyone in the organization. There is no place for backroom lobbying or politics, where personal relationships trump facts and data. High performers get the recognition they deserve, mediocre performers up their game, and poor performers get ousted. Transparency clears the air and creates a single version of the truth that everyone sees and agrees is real.

Open organizations share not just their successes but also their problems and setbacks. They believe that the more people know about issues, the better they will be to overcome obstacles. That's because learning happens when mistakes are made, attempts fail, and pilot tests crash. Unless these failures get shared openly and widely, each person is limited to learning only from their own experiences. Rather than spending precious energy defensively covering up problems and setbacks, openness encourages people to come forward by acknowledging the value of the learning that comes from failure.

Being open is hard for most leaders because we've been trained throughout our careers to believe just the opposite: that sharing is dangerous, that keeping things secret is safer, that information gives you power. We fear that being more open means giving up control. But just the opposite happens: you gain power when you decide how to delegate information access and decision-making rights. By shifting responsibility and accountability to others, you earn credibility and gain their trust—and that puts the organization in a better position to create a more significant change with greater impact.

Invest in openness in the following ways:

- **Measure openness and trust in your culture.** You don't need to measure everything—just a few behaviors that indicate that your efforts to create a more open, trust-based culture are working. For example, how comfortable are people talking to their boss's boss? If there's trust, this should be a practical action rather than becoming mired in politics.

- **Put vital data and information where people can best use them.** Ensure that the data that will most sway a decision are readily available to the people who need it. At the start of the pandemic started, one organization I worked with realised that only executives had access to crucial customer data and metrics. Giving read-only access to anyone working on customer-facing initiatives signaled that the leaders trusted employees to use customer analytics wisely. This isn't about breaking down data silos to create a 360-degree view of the customer, but strategically placing windows between them so that the information your organization already can to the people who can use it to create impact.

- **Jump-start information sharing with your participation.** Among the most underused tools in an organization are enterprise collaboration tools and platforms, like SharePoint, Teams, and Slack. Sharing needs to start at the top, so find ways to share updates on how things are going, provide insight into how decisions are made, and solicit questions to create engagement. All of these actions will break down the power distance that naturally exists between levels and build deeper trust within the organization.

Second, **develop agency in people**, namely the capacity to act independently and make their own choices to see themselves as owners. There are few things more debilitating than feeling powerless or that what you do doesn't matter. In my work with organizations, the top reason why people don't take action is "I don't have permission." What a shame and waste of time to be waiting around for someone to give you the go-ahead.

The problem is that, like openness, we've been trained not to have agency to establish and keep order. Keep your head down, and don't ask questions. Don't think about a better way to do something – that's above your pay grade. Or when we get up the nerve to say something, nothing happens. It's either not heard or simply ignored. So why keep trying to be heard, seen, and known?

In contrast, disruptive organizations support employees to see themselves as owners and leaders of their transformation strategy. When they identify a need for change, they make it happen—and do so regardless of their actual title or role. People who have agency feel responsible for thinking about the organization's good and making decisions based on its long-term interests.

The key to establishing order in such an environment links back to openness – when it's clear what the strategy is, and there's accountability for your actions, it serves as a natural check to undesirable behavior.

Establishing and supporting agency requires systematically doing three things:

- **Define the edges of the field of play**. Watch how children play – if the playground has no fence, they stay close to the center. But a fence defines the boundaries of safety – and you can usually find a cluster of kids pushing that edge. Change is the same – without limits, people fear pushing things too far, so they don't. Define the boundaries of what is possible and take your organization right out to the very edge so that they can see and experience it themselves. You may have to define the boundaries closer in the beginning to build up confidence in both you and your people that it's safe to push out. Over time, keep expanding and redefining the edge to support the organization on the cusp of change.

- **Shift ownership and authority in chunks.** If you give people ownership over a domain or a set of decisions overnight, they actually may not be ready to take it on. Instead, shift the responsibility to them over time—and tell them you are doing that. First, ask them to come to the table with recommendations, invite them to develop an action plan, and eventually make the decision. There is no easy shortcut to building agency in people: shifting ownership requires intention, communication, and mentorship.

- **Clarify when it's OK to disagree versus when it's time to commit.** One of the biggest fears about encouraging debate is that when discussions are over and a decision is made, bad feelings will remain between them. Bad feelings are more likely to arise when disagreements surface after making a decision. Make it very clear that there are places and times for disagreement (e.g., at the start of a project) and encourage all views and positions to be shared. Also, be clear that after this period of debate is over and a decision has been made, the expectation is that everyone will be 100 percent committed to that decision, even if it's not in their favor. Because one day the tables will be turned, and they will know that their colleagues will repay their commitment with their own.

Third, **redefine our relationship with failure**. One of my favorite sayings is, "Experience is what you get when you don't get what you want." You learn and grow when you make mistakes and fail. And yet, I can't tell you how many times I've met highly accomplished leaders who secretly admit to me that they are terrified of failing. They spend a vast amount of energy trying to avoid failure or at least the appearance of it.

Failure carries the stamp of shame, and avoiding embarrassment drives much of what we do. Instead of classifying not hitting your goal as a failure, consider that it's a data point where the gap between the objective and reality can be measured, studied, and closed in the next iteration. Agile leaders know that swift decision-making will reduce uncertainty. Even if the decision ends up in failure, they are better off knowing that it doesn't work than staying back where they were before.

I am not advocating that you intentionally fail, but rather that you take failure in stride, seeing it as an opportunity to learn and find a different way to meet the objective. The capacity to grasp failure makes you realistic about the journey ahead, so you are prepared to rally the troops forward when the inevitable setbacks hit.

To bring order to failure, take these three steps:

- **Conduct effective postmortems.** If your organization is like most others, stigma and shame often follow failure. It’s incumbent on you as a leader to acknowledge failure and help the person who is accountable for it to move on. Conduct a healthy postmortem that focuses energy not on whom to blame but on what everyone can learn and apply in the future. Codifying and sharing that learning across the organization signals that failure must be turned into a learning opportunity and makes it more acceptable to take risks. What should be unacceptable is a failure without learning—a wasted opportunity.

- **Make failure visible.** Former Dun & Bradstreet CEO Jeff Stibel wanted to rewire how the organization thought about failure by adopting a “growth mindset” to look at mistakes as temporary setbacks that unveiled new paths to the objective. He quietly returned to his office one night and created a “failure wall,” using a marker to write some of his biggest failures on the wall for everyone to see. People were encouraged to write their most significant losses on the wall, including what they had learned, and sign their names. While you may not allocate an actual wall in the office, consider using a shared space or document for people to do the same virtually.

- **Define irreversible versus reversible decisions.** The vast majority of decisions we make as leaders are reversible, and yet we treat almost all of them with the same rigor and intensity as if they were irreversible. Clearly define which decisions truly require that level of scrutiny and for the rest, be ready to change your mind if things don’t go as intended. The ability to reverse decisions removes the need to be “perfect” all of the time and allows a level of uncertainty and risk to enter into consideration.

Rather than focusing on the dichotomy between order and change, let’s appreciate how they complete each other. Being disciplined about using openness, building agency, and rethinking failure can prepare you and your organizations to thrive in a world of constant change.

Stereotype Threat and Feedback

Ms Kim Scott and Ms Trier Bryant
Co-Founders at Just Work and New York Times Best-Selling Authors

One's awareness of a negative stereotype about a group to which one belongs can actually harm a person's performance: fear of confirming the stereotype raises that person's level of anxiety and makes it harder to focus. This can occur in people at all levels of organizations, including the top, so leaders must manage it in others and be aware of it in themselves.

In Whistling Vivaldi, Stanford psychologist Claude Steele describes how negative stereotypes inhibit people's ability to do work they are more than capable of doing.[1] He described a Princeton study in which students were asked to play golf. A group of White students were divided into two groups; the first was told the task was part of an athletic aptitude test, while the second was told nothing. The White students who were told the task measured natural ability tried just as hard as the other students. But it took them an average of three strokes longer to get through the course. The hypothesis was that stereotype threat (White people have inferior athletic ability) had hurt their performance. The experiment was then repeated with Black students, for whom both groups performed equally. The difference, Steele explained, was that the Black students didn't suffer a stereotype threat when it came to athletic ability.

Steele ran a similar experiment at Stanford, only this time looking at stereotype threat related to intellectual ability. He brought together a group of Black and White undergraduates and asked them to complete a section of the Advanced GRE test. This test was beyond what they

1. Steele, C. (2011). Whistling Vivaldi: And Other Clues to How Stereotypes Affect Us (Issues of Our Time). United Kingdom: W. W. Norton.

had learned, and Steele hypothesised that the frustration at not knowing some of the answers would trigger a stereotype threat related to intellectual ability in the Black students, and cause them to underperform. Indeed, the Black students did do worse than the White students on the test. To test his hypothesis that this was a result of stereotype threat and not intellectual ability or educational achievement, Steele repeated the test with a different group of Black and White students. This time, he lifted the stereotype threat by telling the students that the test was not a test but rather a "task" for studying general problem-solving. He emphasised that it did not measure intellectual ability. This time, the Black students performed at the same level as White test takers, and significantly better than the Black test takers who believed the test was measuring their intellectual ability.

Steele and other researchers have tested the impact of stereotypes on a wide variety of different biases. In another experiment, researchers gave girls five to seven years of age an age-appropriate math test. Just before taking the test, some of the girls were asked to color a picture of a girl their age holding a doll, while others were asked to color a landscape. The theory was that reminding the girls they were girls would be enough to trigger a stereotype threat: girls aren't good at math. Case in point, the girls who colored a landscape did better on the math test than those who colored a girl holding a doll.

Another group of researchers asked White men with good academic track records to take a difficult math test. In the control condition, the test was taken normally. In the experimental condition, the researchers told the test takers that one of their reasons for doing the research was to understand why Asian men seemed to perform better on these tests than White men. The theory was that the stereotype threat that White people aren't as good at math as Asian people would harm the performance of the White men on the test; and in fact, this is what happened.

Part of a leader's job is to recognise and eliminate the pernicious effects of stereotype threats for the people on their team. It turns out that regardless of the stereotype in question, good, candid performance feedback can go a long way toward eliminating this problem, by explaining clearly what the standards are and reassuring the person you as their leader have confidence in their abilities.

Steele describes the role of good feedback in helping people who are underrepresented overcome their stereotype threats. Straightforward critical feedback from Tom Ostrom, Steele's PhD faculty advisor, helped Steele overcome the struggles he experienced as one of the very few Black students in his program. He also alludes to research that demonstrates this was true not only for him but also for Black students at universities around the country. Note that the feedback was about the work—not about their clothing or affect or something else that might reveal bias and trigger stereotype threat. Similarly, Stanford sociologist Shelley Correll's research has shown that career success requires candid criticism—and that many women don't get that kind of candor from their bosses who are men.[2/3]

There is considerable evidence—both anecdotal and research-based—that good feedback, a clear explanation of expectations, reassurances that an employee can meet those expectations, and guidance when a candidate falls short, are crucial in helping people who are underrepresented succeed in the workplace. Important note: feedback about how other people perceive a person because of bias is not helpful feedback. The feedback should be based on performance or behaviors that can be changed, not personal attributes.

And yet, the very people who would most benefit from good feedback get it least. Overrepresented managers are more reluctant to give feedback to underrepresented employees than to other overrepresented employees. White managers are often more reluctant to give feedback to Black employees than they are to White employees; managers who are men are more reluctant to give this kind of feedback to employees who are women, and so on.

Why? Because there is another stereotype threat at play here: fear of being seen as biased, sexist, racist. Let’s go back to John, who didn’t want to tell Susan about the problems with naming her project Rolling Thunder.He remained silent not because he was a misogynist intent on hurting her career, but because he was afraid his feedback might be interpreted as mansplaining or bullying. He is experiencing stereotype threat (“She thinks I’m a sexist”) and so distancing himself from the situation. A desire not to be seen as sexist leads to discriminatory behavior, a failure to give feedback to women. Therefore stereotype threat hurts the employee’s performance and also the boss’s feedback performance.

The fact that stereotype threat might prevent an overrepresented boss from giving critical feedback to an underrepresented person on their team is really unfortunate because it’s precisely that kind of feedback that will most help the person overcome their own stereotype threat and do great work.

If you’re a leader, get proactive. Make sure you are aware of and managing your own stereotype threat, and that you are giving everyone on your team feedback.

Remember that unconscious bias training is only a start

Bias awareness training can be very helpful in rooting out unconscious bias when it’s done well by people who understand the issues deeply and who are excellent communicators. But in practice it often feels like a sort of “check the box, CYA, protect the company from legal liability, but don’t actually try to address the underlying problem” exercise. The best unconscious bias training includes both an educator/facilitator and participation from leaders, to show real commitment. However, simply requiring everyone to go to unconscious bias training, even a great one, won’t be enough.[4] No training can possibly change deeply ingrained patterns of thought. Practice is key. Education without follow-through breeds cynicism.[5] Therefore, as a leader, it’s your job to figure out how you and your team can interrupt bias when you notice it. Interrupting bias is not something leaders can delegate. Leaders must be personally involved with both helping to educate the team during the training, and, crucially, figuring out how they and their teams will interrupt bias when it shows up in conversation, in meetings, in business

2. Fontana, F. (2019, October 12). The reasons women don’t get the feedback they need. Retrieved June 7, 2002, from https://www.wsj.com/articles/the-reasons-women-dont-get-the-feedback-they-need-11570872601
3. Correll, S., & Simard, C. (2016, April 29). Research: Vague feedback is holding women back. Retrieved June 7, 2020, from https://hbr.org/2016/04/research-vague-feedback-is-holding-women-back?mod=article_inline
4. Levin, S. (2016, May 02). Sexual harassment training may have reverse effect, research suggests. Retrieved June 7, 2020, from https://www.theguardian.com/us-news/2016/may/02/sexual-harassment-training-failing-women
5. Duguid, M. M., & Thomas-Hunt, M. C. (2015). Condoning stereotyping? How awareness of stereotyping prevalence impacts expression of stereotypes. Journal of Applied Psychology, 100(2), 343.

processes. If leaders don't take action to interrupt bias once they recognise it, their employees will notice and think, "There it is again and I'm powerless to do anything about it, so I guess I'll just accept it."

An important first step is to get to a place of shared commitment. When it comes to interrupting bias, a leader's goals are these:

1. Make sure that the interruption is clear enough--don't use euphemisms that belittle the problem.
2. Make sure the interruption does not re-harm the person at whom the bias was directed.
3. Make sure the interruption does not humiliate or attack the person who said the biased thing.
4. Make it safe for the interruption to be public when appropriate so everyone learns. Usually I advise people to "criticise in private." So it's important that a bias interruption feels more like a correction of a typo than a criticism of a person. The reason interrupting bias in public is important is that one gets more educational leverage that way. Often multiple people in the room will share the bias that was spoken and will therefore benefit from the intervention.
5. Make sure the interruption is quick enough not to derail the whole meeting. There may be times when something said is so harmful that the meeting should be derailed. But if a leader wants bias interrupting to become a norm it usually has to happen quickly, in the flow of business.
6. Make sure there's a commitment to come to resolution if there's disagreement about whether what was said was biased or not. Ideally this would happen after the meeting. And if the person harmed is the person who interrupted the bias, an upstander should be present as well as the person who caused harm.

Create a shared vocabulary to interrupt bias

Simple "bias interruptions"— words or phrases that everyone uses to point out bias— can help a great deal. If everyone's speaking the same language to interrupt bias at work, people will more quickly understand what it means and also find it much easier to speak up. A leader's job is not to choose the words, but to get the whole team on the same page about what words they will use to flag bias during conversations and meetings.

Bias interruptions won't work if they feel like it's some kind of boss-mandated or HR-imposed initiative. If a leader's team comes up with their own words or phrases rather than having the leader dictate them, they're more likely to use them. However, a leader does need to offer some guidance. Bias interruption will backfire if the phrases chosen are themselves unconsciously biased. Words matter. Take some time with them. A leader can encourage "I" statements that invite the other person to consider the situation the way the speaker does. But it doesn't have to be an "I" statement.

Here are ideas that have been proposed in talks and workshops I've led:

- "I don't think you meant that the way it sounded to me."
- "Bias interruption."
- "I'm throwing a flag on the field."
- "Yo, bias!"
- "Bias alert."

Some teams like a sentence not a phrase. Many have found it helpful to adopt Daniel Kahneman's phraseology from the book Thinking, Fast and Slow. If a leader has read the book and if their team is interested in reading it, the leader might choose to adopt his suggestions and teach the team to say things like: "I'd like to invite your System 2 to interrupt your System 1. Slow down and let your System 2 take control."[6]

The nice thing about the language around system 1 and system 2 is that it offers an explanation for the bias and how to change it, rather than a judgement of the person who said the biased thing. It also demonstrates an understanding of the energy and effort it takes to interrupt bias. Personally, I love that language. But for some it might sound annoyingly wonky. A leader should let their team choose words that work for them.

The conversations leaders have with their teams to come up with bias interruptions may be difficult. Some may feel that phrases like "bias alert" trivialise the harm that bias does. Others may be irritated that the leader are "wasting so much time on this." And the leader may feel stuck in the middle. Remind everyone of the goal: to come up with a shorthand phrase that allows for a quick intervention. The quicker the intervention, the more often it is likely to happen; and the more often biases get interrupted, the more the team learns. It's a little bit like reminding one's kids to brush their teeth every night. If the parent delivered a long lecture on dental hygiene and how plaque builds up and will give them cavities if they don't brush, pretty soon the parent would hate saying it as much as they hate hearing it. Just saying "Teeth!" is easier on everyone and just as effective.

If a leader's team hates the idea of the bias interruptions, the leader can ask them for other suggestions for accomplishing the same thing. The leader must be open to their ideas. But if they come up with an alternative, the leader must hold them to following through with it. And be open to the possibility that there simply may not be enough trust on the team to make this work. Then the leader will have to do more digging to find out why, and figure out how to fix it. Not only is it impossible to interrupt bias if there's not trust--it's impossible to collaborate effectively.

Entrepreneur Jason Mayden explains why it's important both to make it safe to make mistakes, and also safe to point them out. He encourages people to "get beyond the fear of saying the wrong thing because you can't get to the right thing without first making some mistakes in between." At the same time, "I should not hide my truth to make you feel comfortable in your bias,"[7] says Mayden.

6. Kahneman, D. (2011). Thinking, Fast and Slow. New York: Farrar, Straus and Giroux.
7. Mayden, J. [@jasonmayden]. (n.d.) #curbsideministries [Instagram hashtag]. Retrieved from https://www.instagram.com/explore/tags/curbsideministries/?hl=en

Thriving in Times of Uncertainty, Change and Crisis

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Uncertainty. Change. Crisis. These three words can cause stock markets to crash; invoke feelings of dread among chief executives and boards of directors; and instill fear and speculation among employees, customers and the public.

We all know that crises and uncertainty are common in pressure-cooker environments such as the White House Press Office, Mayor's Chief of Staff Office, hospital emergency rooms, military stations, emergency response centers, and other high-stakes, high-profile arenas. And we are all-too-familiar with frequent news reports of catastrophic crises such as the Deepwater Horizon oil spill, Boeing 737 MAX passenger jetliner crashes, and the more recent January 6, 2020 attack on the U.S. Capitol. However, many leaders tend to view these crisis situations as spectators, failing to recognise and prepare for the day when a similar situation could happen to them.

There is an all-too-pervasive mindset that these types of crises happen to other leaders, and other organizations. Yet the recent COVID-19 pandemic clearly demonstrates that no organization is immune from crises, and the inevitable change that comes with them. Whether facing a violent attack, security breech, leadership scandal, or a pandemic, the adage holds true – it's not a question of if, it's a question of when an organization will face uncertainty, change and crisis.

In addition to navigating the often very public reputational, social and political risks that come with the turbulent waters of crises, significant organizational and operational challenges also require attention and steady leadership. Leaders may need to simultaneously manage a crisis with implementing large-scale change management and project management.

We can define these three forms of management as:

1. **Crisis Management** – the process by which an organization deals with a disruptive and unexpected event that threatens to harm the organization or its stakeholders[1]
2. **Change Management** – the systematic approach and application of knowledge, tools and resources to deal with change. Change management often involves defining and adopting corporate strategies, structures, procedures and technologies to handle changes in external conditions and the business environment.[2] According to the Society for Human Resource Management (SHRM), effective change management goes beyond project management and technical tasks undertaken to enact organizational changes and involves leading the "people side" of major change within an organization.
3. **Project Management** – the management of large, complex projects that impact the entire organization[3]

1. Jonathan Bundy, Michael D Pfarrer, Cole E. Short, W. Timothy Coombs, "Crises and Crisis Management: Integration, Interpretation, and Research Development," Journal of Management 43 (6): 1661–1692 (2017): doi:10.1177/0149206316680030. S2CID 152223772
2. "Managing Organizational Change," SHRM, accessed April 5, 2021, https://www.shrm.org/ResourcesAndTools/tools-and-samples/toolkits/Pages/managingorganizationalchange.aspx
3. PMP Project Management Professional Study Guide. (McGraw-Hill Professional, 2003), p.354, ISBN 0-07-223062-2 .

Whether working in a Governor's Office, a Fortune 500 company, an academic institution or other organization, every Chief of Staff or executive leader will likely need to navigate the "triple threat" of simultaneous crisis management, change management and project management at some point during their tenure. For example, the recent COVID-19 pandemic brought challenges across multiple organizational functions, including human resources, legal, communications and public relations, budget and finance, and information and technology.

The pandemic simultaneously:

1. Presented many organizations with full-scale crises (such as health and safety threats to their employees and customers, decreased revenues and stock prices, and workforce reductions);
2. Invoked dramatic changes to business models (such as drastic shifts toward technology and online interactions, huge modifications and impacts on revenue generation, and sweeping changes to service delivery methods);
3. Brought large-scale, complex projects to manage (such as retrofitting office spaces while implementing COVID-19 testing plans and developing new health, safety and HR policies).

And yet, many organizations rose to the challenge and not only survived, but thrived. What were the keys to their success?

Many organizations that thrived during the global pandemic implemented best practices that any skilled chief of staff or executive will easily recognize as essential to an efficient and crisis-proof operation. These can be divided into critical steps to be taken across three phases:

1. **Pre-Crisis:** before a crisis or major organizational change
2. **Crisis Resolution:** during a crisis or major organizational change, and
3. **Post-Crisis: after** a crisis or major organizational change

1. Before a Crisis or Major Organizational Change

1. a. Role Clarity

In the midst of a crisis or major organizational change, organizations cannot waste precious time trying to figure out who has the ball on certain decisions or tasks. Successful organizations have clearly established roles and well-defined responsibilities in advance of any crisis.

Role clarity means knowing who to contact and who "owns" each crisis. Who are the institution's go-to subject matter experts? Who needs to approve certain decisions and plans? Who is responsible for implementation? Who will communicate to stakeholders? These are the types of questions organizations should review and delineate clearly. Successful organizations ensure everyone on the team is clear on roles and responsibilities on an everyday basis, leaving no doubt who is responsible for certain functions and tasks.

For example, a governor's chief of staff may need to trouble shoot numerous crises each day. The day could begin with an oil spill in the harbor, followed by a fatal shooting of a police officer, and end with an electrical outage across multiple towns – all while managing the regular day-to-day operations and various cabinets and agencies of the Executive Branch of state government. Because information must be gathered quickly and decisions often need to be made in a matter of minutes, role clarity is absolutely crucial.

In addition to achieving role clarity for day-to-day operations, crisis preparation often takes this one step further with the establishment of a Crisis Management Team (CMT) or Incident Management Team (IMT): a specific set of individuals who prepare an organization to manage and respond to crises and emergencies. Again, it is essential that all team members are made aware of who serves on the CMT and IMT, how decisions will be made and executed, the reporting structure for CMT and IMT members and the rest of the organization, as well as how other team members will or will not interact with the CMT and IMT.

While establishing responsibilities and clarifying roles, it is important to assess how both formal and informal authority works in your organization, and how that may factor into decision making and task execution. Organizations should assess, and determine in advance, whether informal authority figures need to be consulted or involved. In which ways must they be consulted, and how does that impact, and potentially delay, critical decision making? For example, does the organization have ex-officio Board Members, faculty subject matter experts, founding partners, or other key stakeholders that need to weigh in on certain decisions? Be sure to take this into account and have this clearly delineated and communicated in advance, so precious time is not wasted in the midst of a crisis.

1. b. Emergency Procedures Guides (EPG), Critical Incident Management Plans (CIMP) and Continuity of Operations (COOP) Plans

Successful organizations do not wait until a crisis has emerged to establish ***Emergency ProceduresGuides(EPG),CriticalIncidentManagementPlans(CIMP),andContinuityofOperations (COOP) Plans.***[4] In fact, in the middle of a crisis, there will not be time to do so! Critical Incident Management Plans (CIMP) seek to maximise human survival and preservation of property, minimise danger, and restore normal operations as quickly as possible. Continuity of Operations (COOP) Plans outline how an organization plans to continue its essential functions during a wide range of emergencies, including acts of nature, accidents and technological or attack-related emergencies.

Emergency Procedures Guides clearly and succinctly outline what steps need to be taken under a variety of emergency situations: such as severe weather incidents (like tornados, earthquakes and floods); fires and explosions; infrastructure outages; hazardous materials release; medical emergencies; pandemics; bomb threats; violent incidents (such as an

4. "What is Continuity of Operations?", FEMA, Accessed April 17, 2021, https://www.fema.gov/pdf/about/org/ncp/coop_brochure.pdf

active shooter or terrorist attack); as well as how to address suspicious objects, odors and persons; and guidelines for evacuation and sheltering-in-place. For larger organizations such as universities, residential communities and business complexes, emergency alert systems that transmit signals or messages via text, phone and email can also be helpful in alerting stakeholders of impending emergencies.

However, creating effective emergency plans are just one step in effectively addressing crises. Organizations should also ensure their teams are well-informed of all EPGs, CIMPs and COOPs on a consistent basis. Even the best-designed emergency plan will do no good if it is not consistently communicated throughout the organization. New hires should be provided with emergency procedure manuals and trainings as part of the onboarding process, and for existing employees, annual or twice-annual trainings and scenario planning exercises often work well.

By having these emergency plans in place well in advance of any incident, organizations will be far better equipped to handle crises when they inevitably occur. For example, when the COVID-19 pandemic hit in the spring of 2020, the University of Virginia was well-positioned to spring into action, since its campuses, such as UVA Darden DC Metro campus led by Associate Dean Greg Fairchild and Director Laura Hennessey, had already partnered with UVA Emergency Management to conduct safety trainings, establish EPGs, CIMPs, COOPs and emergency alert systems, and had built critical relationships with emergency response teams prior to the pandemic. This saved valuable time and allowed the university to focus on other emerging aspects of the pandemic.

1. c. Crisis Communications Plan

Similarly, organizations will likely not have time to establish a complete crisis communications plan in the midst of an emergency. Therefore, it is important for every organization to have a crisis communications plan in place in advance that includes a wide array of potential crises (e.g., violence or terrorist incidents, security breaches, pandemics, public scandal, layoffs, drop in stock prices, and so on) and which outlines how the organization plans to communicate to each key stakeholder group in each of these instances.

In developing a crisis response, University of Virginia Darden School of Business Professor June West and Executive-in-Residence Steve Soltis recommend that leaders first evaluate why they are communicating – asking “what is the purpose of the communication?”[5] Leaders can ask themselves, “what do my stakeholders need to hear about, and what do I need my stakeholders to hear from me?” This will often help hone the messaging and ensure communications are succinct, clear and effective. This is a time when exhaustive lists and extraneous information should be avoided. As a general rule, simplicity and frequency wins the day when it comes to crisis communications.

5. June West, Steve Soltis and Gosia Glinska, “Communications in the Time of the Coronavirus: Lessons for Leaders,” UVA Darden Ideas to Action, April 14, 2020, https://ideas.darden.virginia.edu/communications-in-the-time-of-the-coronavirus-lessons-for-leaders

2. During a Crisis or Major Organizational Change

2. a. Problem Assessment and Information Gathering

It is important for leaders to first gather some critical information and fully assess the problem when faced with a crisis, before giving into the temptation to lunge forward and act upon the multiple tasks at hand. Be sure you thoroughly understand the problem and the full range of challenges your organization is facing before you dive into problem-solving. Here, the advice often incorrectly attributed to Albert Einstein can serve as a good guide: “If I had an hour to solve a problem, I’d spend 55 minutes thinking about the problem and five minutes thinking about solutions.”

Leaders should ask some simple, but revealing, questions to better understand the problem, its scope, and its consequences. Simultaneously, they should tap subject matter experts to provide data-driven, fact-based information and guidance. Quickly read the latest research, review guidelines from local, state and federal agencies, consult with experts, and utilize whatever internal and external resources you have at your disposal. Many times, this will enable an organization to follow best practices (and avoid reinventing the wheel), while ensuring that legal and government mandates and regulations are followed and incorporated into planning.

During the COVID-19 crisis, many large organizations (such as local governments, universities, and large corporations) performed benchmarking and literature reviews, and conducted focus groups, surveys, and town halls at the onset of their planning, given the uncertainty and seemingly ever-changing data and guidelines surrounding the pandemic. Some also established teams of epidemiologists and health experts to ensure that all operational decisions were guided by evidence and science, in order to keep their large populations safe and healthy.

This is a critical initial step before progressing to the next: establishing a plan of action.

2. b. Establish a Project Plan

Remember earlier when we discussed that times of crisis often also bring change management and project management too? After ensuring that the organization has role clarity, emergency procedures, crisis communications plans, gathered critical information and fully assessed the problem, it is time to break down the crisis into manageable pieces for task execution.

Next, establish a project plan and ensure everyone in the organization knows and understands the plan. It may be tempting to dive into the crisis and begin trouble-shooting and executing tasks before a plan is in place, and in a crisis such as COVID19, it may feel a bit like trying to fly the plane while building it. It is also important to ground the plan in a shared vision and a common sense of purpose. A shared vision ensures that the organization has critical buy-in from key stakeholders, who may be essential to executing the plan.

While creating the plan, it is important to establish clear goals, deliverables and timelines for project execution. Depending on the size and scope of the crisis and projects to be completed, include applicable key elements in the plan such as:

- Gantt chart (a type of bar chart that illustrates a project schedule): detailing major project milestones and deliverables.
- Scenario planning and stress testing: before instituting a transformative change, stress test it with actors. For example, walk through the first day back to school from a student's perspective, trace the steps and customer journey for consumers who may use your products or services, and so on.
- New or revised policies, procedures, and protocols.
- Operational changes: for example a new service delivery model, business model, or training employees on new procedures .
- Major purchases and investments to be made and items to be secured.
- Communications and stakeholder engagement.

While building out the project plan, leaders would be wise to check in with "boots on the ground" employees and teams, to ensure that the plan is feasible and will work in real time. Often these team members have critical information and can raise important considerations that may impact project execution, which are essential to incorporate in the initial planning stages. Leaders who skip this critical step do so at their own peril, as crises rarely allow time to readjust plans that may have missed essential elements or ignored important considerations that may keep the project on-time, on-budget and successful.

In addition, it is important for leaders to incorporate allowances to preserve the organization's unique qualities, traditions and strengths. Does your organization have certain rituals or assets that make it unique and appealing to stakeholders? Do you have a strong and tight-knit workplace culture? It is advisable to review and incorporate these considerations into the plan so your organization's unique assets, traditions, and culture can be preserved despite any operational or policy changes that may be implemented.

2. c. Communicate the Plan

Next, communicate the plan to key stakeholders and the community. Ensure communication happens frequently and throughout all levels of the organization, utilizing in-person communication such as town halls, and written communication such as emails, websites and FAQs. Inform key stakeholders of the plan throughout each phase of the project and pay close attention to the various communication channels that will be most effective. Where and how does your team and stakeholders typically receive important information: via a website, an internal portal, through emails from leadership, or by other means? In addition, large-scale or long-term projects may require the creation of a new webpage, guidebook or portal to keep stakeholders apprised. Be sure to align expectation with the appropriate communication platforms and establish communication channels where your stakeholders know they can always go to receive the most up-to-date information. It is important to refresh the information frequently to keep the content current.

In many crisis situations, and when executing large-scale projects, it is often helpful to create feedback loops to keep gathering critical information. Focus groups, town halls and surveys, for example, will allow the organization to: determine what is working (and what is not); monitor progress; test assumptions; and establish ongoing, two-way communication between leadership and key stakeholders. Feedback loops are also helpful in building trust, which is essential in effectively handling crises, managing uncertainty, and implementing large-scale organizational change. Even the best-laid plans will falter if leaders have failed to build trust and buy-in among the organization's key stakeholders.

2. d. Execute the Plan

Finally, ***execute the project plan***, ensuring adherence to budgets and project timelines. During project plan execution, it is important for busy Chiefs of Staff and executive leaders to designate project managers, who can handle the day-to-day elements of the plan and keep their leaders apprised. Harvard University's National Preparedness Leadership Initiative experts Eric J. McNulty and Leonard Marcus note the difference between leading through a crisis and managing through it, arguing that "*The most effective leaders in crises ensure that someone else is managing the present well while focusing their attention on leading beyond the crisis toward a more promising future.*"[6]

While keeping an eye on budgets, timelines and other critical aspects of the project plan, effective leaders prioritize the human side of the crisis and the toll it might be taking on their team, customers and other stakeholders. One of the silver linings of the COVID-19 pandemic is that it brought front and center something that can often get lost in organizational settings: that organizations are comprised of human beings, and human beings need to be cared for. The human suffering, mental health challenges, and physical toll that the pandemic laid bare helped many organizational leaders to recognize and reaffirm their commitment to tend to the people under their care. According to University of Virginia Darden School of Business Professor Toni Irving, "*You have to be kind to everyone. You have to pay attention to everyone. You have to humanize everyone. You have to listen to everyone.*"[7]

Amidst the complex matrix of project expenses, deadlines, deliverables and the 24/7 news cycle, it can be all-too-easy to forget that human beings will be impacted by nearly every decision the organization makes during a crisis; so human beings should be at the center of each decision and action. This humanizing concept was illustrated by James "Jimmy" Dunne, managing partner of the investment bank Piper Sandler, which lost 40% of its personnel in the World Trade Center during the 9/11 terrorist attack. Dunne claimed that "*the more he led on*

6. Eric J. McNulty and Leonard Marcus, "Are You Leading Through the Crisis…or Managing the Response?" Harvard Business Review, March 25, 2020, https://hbr.org/2020/03/are-you-leading-through-the-crisis-or-managing-the-response
7. Mary Margaret Frank, Morela Hernandez, Toni Irving, Lili Powell, Laura Morgan Roberts and Catherine Burton, "Wisdom from Female Experts at Darden," UVA Darden Ideas to Action, March 30, 2021 Link: https://ideas.darden.virginia.edu/wisdom-from-female-experts
8. Eric J. McNulty and Leonard Marcus, "Are You Leading Through the Crisis…or Managing the Response?" Harvard Business Review, March 25, 2020, https://hbr.org/2020/03/are-you-leading-through-the-crisis-or-managing-the-response

the people issues — personally attending funerals, continuing salaries and benefits, and other efforts — the more the business issues seemed to take care of themselves."[8]

3. After a Crisis or Major Organizational Change

3. a. Solicit Feedback

After resolving the crisis, completing the project, or instituting major organizational change, **solicit feedback** from key stakeholders. Seek out constructive criticism to evaluate what worked well, and where there may be opportunities for improvement. Conduct surveys, hold focus groups and town halls, or create an anonymous suggestion box to facilitate honest feedback.

As with any major undertaking, it is crucial to conduct a post-mortem and a review process to evaluate your efficacy, and use this feedback to incorporate key learnings into operations, policies and procedures moving forward.

3. b. Review and Adjust the Plan

Even the most effective and successful plans will have room for improvement. Review and adjust the plan as necessary. It is advisable to view the plan as an iterative process, as opposed to a "one-and-done" document that sits on a shelf. Since future crises undoubtedly await, successful organizations continue to tweak their planning documents as feedback and new and more complete information become available.

3. c. Learn From Your Mistakes

Learn from your mistakes and use those lessons to incorporate long-term, transformative change. Take time to reflect on your process and consider what you were unprepared for and incorporate these elements into each plan going forward. What wasn't a part of your emergency plan, crisis communications plan or project plan (that should have been)? Leaders should ask themselves and their stakeholders what worked well, what didn't, whether there were any communication gaps or holes in the organizational structure, where there may have been delays in decision-making and project execution, and so on. Since it is unlikely that this will be the last crisis the organization will face, it helps to review these lessons while they are still fresh in stakeholders' minds, so the organization can be even stronger and more adept at resolving future crises. As former White House Chief of Staff, Congressman and Chicago Mayor Rahm Emanuel once advised, "*Never let a good crisis go to waste.*"

Summary

With the current pace of change and disruption, and the ever-present possibility of impending crises such as the recent COVID-19 pandemic, organizations need to be prepared to address crises and position themselves to effectively implement the inevitable organizational changes that ensue. Thriving, and not just surviving, these challenges means taking appropriate steps before a crisis, throughout the crisis, and post-crisis.

Although in the moment a crisis can feel much like a sprint race, it is more akin to a marathon. It requires careful preparation before, during and post-event, as well as a long-term perspective that sees the organization successfully beyond the crisis and into the future. As Hootsuite founder and CEO Ryan Holmes once said, "*You can run a sprint, or you can run a marathon, but you can't sprint a marathon.*"[9] Sidestepping critical steps in preparing and responding to a crisis will undoubtedly lead to negative (and sometimes catastrophic) results. The organization that prepares well, and for the long haul, wins the race.

9. Drake Baer, 'How HootSuite CEO Ryan Holmes Is Building A Yoga-Loving Maple-Syrup Mafia', Fast Company (2013)
   Link: https://www.fastcompany.com/3019055/how-hootsuite-ceo-ryan-holmes-is-building-a-yoga-loving-maple-syrup-mafia

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