USE OF SELF IN LEADERSHIP:

A Pilot to Understand How Leaders Use Their Selves in Leading Others

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Abstract

This research report presents a study on the Use of Self in Leadership. It describes the literature on Use of Self and related concepts. This study was a pilot with a population of leaders that previous studies had not examined. Previous research on Use of Self has examined other populations, such as change agents and clinical roles (for example, therapists and nurses), but we could not find studies that examined use of self with leaders. An existing use of self-survey was adapted from an earlier survey and was used to identify new exploratory factors that were used to examine sub-groups means for specific demographic variables. Of the new factors identified, Factor 6 **(**Collaborative, Humanistic Behaviors**)**, had the highest mean **4.26**), followed by Factor 4 **(**Self-Awareness**, 4.08)** and Factor 3 **(**Interpersonal Relations & Social Interaction, **4.04**). In contrast, the highest factor in the original study was Attention to Relationship-Centric Values & Behaviors **(4.07)**

What seems to stand out from both studies:

- are the high importance of relational attention, development, and practice

- the importance of self-awareness

- the value of learning, experience, and practice

- the equality of genders in using self

As the second direct research study on this concept, the study also helps to set up further research pathways. Conclusions and implications for leaders and those who educate and develop, close out this report.

Acknowledgements

Introduction

Use of Self is a concept that has the potential to help leaders enhance their influence on those they interact with, their engagement of people to get better results and outcomes, and the execution of their functions using their best selves. In any roles that involve helping or serving others, Use of Self work can be central in one's development and execution of their roles. When complex changes and disruptions occur, leaders need to bring their best thinking, skills, emotions, creativity, and whole self.

Some of these changes can be hard to do when current practices and ways of being have worked well in the past. In the same way that most people are re-orienting, refreshing, or re-thinking their life and work, leaders will need some space to transition as well.

Our Use of Self always needs to start with a good understanding of who we are and how we show up and behave throughout our days in various situations. Self-awareness provides a base for bringing who you are, managing who you are, and using who you are, in service to your role intentions. But it needs to be followed up with a person's strengths, emotions, skills, choices, knowledge, and personhood in action.

Conducting this research with leaders will create a first grounding in how those leaders see their leadership actions, behaviors, and style through multiple elements (awareness, intentions, choices, behaviors, reflections) within the concept of Use of Self. Historically, the learning, understanding, and sharing was derived through practice, experience, and mentoring. However, little research on Use of Self has been published (Cheung-Judge and Jamieson, 2020; Traxler (in press). Many people in many professions have learned about it and grown their Use of Self practice through passed down-wisdom from founders and other senior practitioners. The concept has grown from work in the clinical sciences and organization development. Along the

way, various aspects of the Use of Self have been brought forward in practice and literature. For example:

A. Sam Culbert (1967) highlighted the roles of self- disclosure and feedback in understanding who we are. He built on the earlier work of Luft and Ingram's (1955) Johari Window focusing on interpersonal relations.

B. Bob Tannenbaum (1995, 1997, 2005) focused mostly on the human person and their awareness and development for doing helping work. Tannenbaum emphasized relationships as the medium for work, the whole person, and the interdependence of connections in systems. He cautioned against the overuse of methods, tools, and techniques to hide from, rather than use, ourselves.

C. Herb Shepard (1975) created eight Rules of Thumb for Change Agents, some of which provide insight into the Use of Self, such as:

○ Let your whole self be involved in the undertaking. It means a lot of putting together parts that have been divided.

○ Staying alive means loving yourself and staying in touch with your purpose, using your skills, your emotions, your labels, and positions. It means not being trapped in other people's games.

○ Starting where the system is has been called the 'empathy rule'. We need to understand how the clients see themselves, their situation, their need to understand the culture of the system and establishing the required rapport. Even an unwitting or accidental violation of the empathy rule can destroy the situation.

D. Charlie and Edie Seashore (1997) brought clarity to the importance of behavior choices.

E. Charlie Seashore and colleagues (2004) discussed the conscious and unconscious aspects of self, including the positive aspects and those aspects we dread or like less about ourselves. He also introduced the importance of one's agency and efficacy.

F. Use of Self has strong Gestalt roots that brought attention to the presence of the change agent in moving people through the Experience Cycle (Nevis, 1987).

G. Mee Yan Cheung-Judge, (2001, 2012, & 2018) highlighted 'aware of' and 'use' of our own emotional, perceptual, and cognitive processes to create the impact that is needed in the system and bringing our whole selves to the work we do.

H. National Training Labs (founded in 1947) and the T-group helped individuals learn about how they were perceived and how they impacted others. Both experiences involved the Use of Self being brought into clarity and focus. Behavior occurring from group work highlights how people showed up, acted, and were perceived. Self-expression and feedback were the currency for learning at the individual level, while the way the group functioned and developed gave insights into group dynamics. Both of these learnings are key to understanding people's behavior. The learning, insights, choices, and abilities to understand and develop aspects of the Use of Self became the developmental focus for many of these groups.

I. Warren Bennis (1985) carried Use of Self from his early organization development (OD) work into his leadership thinking and writing in which self-

awareness became a critical element (he referred to a Greek quote 'Know thyself').

J. Warner Burke (1982), in his classic OD text, pointed out the importance of one's instrumentality in conducting both diagnosis and intervention.

K. Ted Tschudy (2006) discussed how the practitioner grows more conscious in using their intent to impact on the situation. This will require OD practitioners to be able, willing, and committed to build trusting relationships with those they work with. Trusting relationships require us to stay authentic, congruent, open, and transparent – which often emerges from deeper inner work.

L. Jamieson and colleagues (2010) created the first competency model of Use of Self to highlight what change agents need to do in the continuous Action Learning Cycles that each situation presents. From these cumulative experiences, we learn about ourselves and our impact. We reflect on our choices, actions, and intentions to build our repertoire of who we are and how we behave. Jamieson and Davidson (2019) added further clarity to the Action Learning Cycles around what makes up the 'self' that we can use to develop greater awareness and skills.

M. Matt Minahan and Russ Forrester (2019) describe the meaning and progression of Use of Self based on the framework of Arthur Young's Process Theory as a back-and-forth dance between freedom and constraints. The framework is based on the work of Edie and Charlie Seashore. To be effective, OD practitioners need to be able to trust their own inner resources, make discerning judgments in the 'here and now,' stay choiceful in their behavior, and selective of the 'intervention' that may work best in a unique context to achieve the desired outcome. This state of

being calls for a level of integration of who we are with what we have within –
pulling ourselves together as an instrument to serve others.

N. Edgar Schein and Peter Schein (2018, 2021) stressed the importance of the right
relationships in carrying out successful execution in leading and changing. They
discuss different levels of relationships and advocate for Level 2 (open & trusting)
where openness and trust are prominent, and which require our best use of self.

O. Cheung-Judge and Jamieson (2020) conducted the first global research to ground
the elements of this concept and understand how people in the OD profession
defined it, what they experience in their Use of Self, how much, how often, or to
what extent they did various practices in their life and work.

P. Bob Tannenbaum and Bob Hanna (1985) summed their thinking about Use of
Self by describing that the Use of Self requires:

- social sensitivity,

- an ability to accurately read the environment, and

- a high degree of action flexibility (having the capacity to act in different
ways as appropriate to the situation).

To Tannenbaum and Hanna, the Use of Self is much more than mere technique; rather it
is an approach, developed as a mindset and skillset over time, that emanates from the core of the
person.

A leadership role is a high impact role; leaders yield power and influence to produce
results, outcomes, and impact. But Use of Self has not been widely introduced to students
through leadership courses or leadership development programs. This pilot study was undertaken

to see how leaders use various practices, think about their 'leading' actions, and reflect on how they use themselves.

The Concept of Use of Self and its Origin

But where did it all start? Regardless of various claims around the origin of the Use of Self, we must go back to the theories and discipline of Gestalt Psychology and Gestalt Therapy. Both fields emerged in the 1800s as an effort to put psychology on the map of investigative science. This emergence, together with a well-intended departure by a group of philosophers, psychoanalysts, and scientists from the 19th century medical view of psychoanalysis, of which Freud was the main proponent, gave birth to most of the central tenants behind the formulation of the Use of Self-concept. Cheung-Judge (2019) documents the role of Gestalt Psychology and Psychotherapy. Max Wertheimer, Kurt Koffka, Martin Buber, Wolfgang Kohler, and Kurt Lewin played key roles in shaping the central tenets of Gestalt Therapy. Cheung-Judge and Jamieson's (2020) review of the Use of Self literature found 60 definitions and descriptions of Use of Self. The frames and lenses through which the Use of Self was explored varied from purely psychological discussion of the 'self' to descriptions of what values, characteristics, mental models, core skills, and levels of self-awareness around specific behavior were central to the masterful Use of oneself. The following examples represent the most used descriptions and definitions of Use of Self.

- Nevis (1987, p.125) states, "The use of self is the way in which one acts upon one's observations, values, feelings and so forth, in order to have an effect on the other."
- Further, Nevis (1987, p. 54) elaborates, "The OD practitioner is not only to stand for and express certain values, attitudes, and skills, but to use these in a way to stimulate, and perhaps evoke from the client, actions necessary for movement on its

problems...the aim is to take advantage of the issues of differences, marginality, and attraction by the client so as to use oneself in the most powerful way."

- Jamieson, Auron, and Shechtman (2010, p. 5) state, "Use of self is the conscious use of one's whole being in the intentional execution of one's roles for effectiveness in whatever the current situation is presenting. The purpose is to be able to execute a role effectively, for others and the system they're in, without personal interference (e.g., bias, blindness, avoidance, and agendas) … to have clear intentions and choice."

- Tannenbaum (1997, p. 173) states, "To be able to be relevant in the here and now takes a person who is centered, sensitive, flexible, who has tolerance for ambiguity, who can stay with the immediate situation and help those with whom s/he is working to flow once again with the river."

- Seashore et al., (2004, p. 42) state, "The simplest way we know to talk about Use of Self is to link the concepts of self-awareness, perceptions, choices, and actions as the fundamental building blocks of our capacities to be effective agents of the change. Hopefully to make a better world and to develop our own potential for doing so to the fullest in the processes."

- Seashore et al., (2004, p. 44) state, "Use of self consists of intentional, conscious and deliberate choices which result in action/behaviors taken to bring about change."

- Rainey and Jones (2014, p. 107) state, "Use of Self is acting on feelings, observations, and thoughts to advance the work of the client."

- And Rainey et al., (2014, p. 114) state, "Use of Self is the process of acting upon a complex set of factors related to the consultant, client, and the practice of OD. It

requires attending to self and client while honoring the values that are fundamental to OD. Use of Self is the integration of consultant (values, assumptions, beliefs, biases, tendencies), client (attending and engaging with integrity and purposeful intention) and OD (values, principles, theory, practices)."

The Nine Clusters Grid

From the 60 definitions and descriptions of the Use of Self, Cheung-Judge and Jamieson (2018) developed themes from the Use of Self definitions and descriptions, identifying nine clusters with similar meanings.

1. Cognitive Cluster	2. Affiliative/Emotion Cluster	3. Courage Cluster
Cognitive power to sift through data Strategic insights in seeing the whole system Ability to frame and reframe clients' issues Deep Knowledge of our trade Perceptual insights of situational dynamics Able to separate data from interpretation Is a Systemic thinker	Being empathetic Holding positive regards of people At ease in showing compassion to others Showing grace for others Paying attention to emotional reaction (self and others) Able to sense the level of safety people need to do the work Not afraid to show emotion at work	Sense of self-efficacy Sense of self-agency Able to take evocative and provocative stances when necessary Dare to differentiate and hold one's own opinion Ability to engage in straight talking and point out the unspeakable issues Courage to put self on the line Champion partnership at work with clients Humanitarian value Committed to scientific inquiry Hold strong client centric value
4. Character Cluster	**5. Skills Cluster**	**6. Values Cluster**
Trustworthy Shows humility Respectful to others Desire to serve others Relationship centric – build good connection with others Sensitive to the flow of feedback Desire for continuous learning and growth Attempt to be non-judgmental of others Have patience to watch the unfolding of events	Good listener Tolerate confusion and able to work with ambiguity without rushing clients to come to pre-mature decision or action State things succinctly, clearly and directly Able to take advantage of issues of differences marginally, Capable to take risk to achieve result Able to do experiments on the go Use inquiry in relationship building	Appreciation of diversity Commitment to Equality and inclusion practice – as well as justice and fairness issues. Commitment to using democratic processes In a learning and developmental stance Champion partnership at work with clients Humanitarian value Committed to scientific inquiry Hold strong client centric value
7. Self-work Cluster	**8. Discipline (self-management) Cluster**	**9. Continuous self-work and growth Cluster**
Aim to do work to deepen our sense of awareness of self and others; managing boundaries Work to be authentic and transparent Being congruent Call for mindfulness Continue to work on unresolved issues in own life Willing to invest in doing our own inner work Knowing how to stay choiceful and intentional Commit time for self-care	Undertake supervision Practice those skills that have high impact on others Cultivate those habits that will increase the ability of generative thoughts and emotional renewal Practice relating to others without judgement Learn when to share (or not to share issues) Stay non-reactive to challenging situation and people Can separate serving my needs from those of the clients	Continue to do deeper inner self-work Seek feedback and learning opportunities – willing to undertake supervision Continuous development of trade knowledge Continuous development to increase cognitive, perceptive, and affective capacity Reflective practitioners Track how one's behaviors/habits impact others Consciously develop presence through more integrative work

Table 1 Nine Clusters Grid

(Adapted from Cheung-Judge & Jamieson, 2018).

In Summary, based on the Use of Self definitions, we considered Use of Self to be at its best when we use what we know about ourselves to intentionally draw on aspects of our whole selves to positively impact the current situation through providing service, helping change, and assisting others. To achieve this state of Use of Self involves us:

A. Taking time and effort to know ourselves (both the positives and less desirable parts),

B. Assessing each situation, we enter in terms of the other(s) present and context factors,

C. Ascertaining what is needed,

D. Determining our intention,

E. Weighing our capabilities,

F. Seeing and selecting from choices, and

G. Paying attention to what we may need to consciously manage about ourselves for the good of the situation.

Our Use of Self begins with our self-awareness, what we know about who we are. This includes how well we know our whole self, our personas, shadows, personality, styles, attitudes, values, knowledge, skills, and identities. How much each of our 'self' components show up affects what we see, how we know, what we do, and ultimately how we execute our roles.

Our self-understanding is a critical element to our successful Use of Self. Without it we fly blindly, not knowing why we do what we do or think what we think. Our self-understanding provides the basis for using ourselves through engaging the parts that we must use and managing other aspects of ourselves to be most in service to others. Without self-understanding we cannot be intentional in making a choice, most often because we are unaware that there is a choice to be

made. We can also hold ourselves back due to fears, lack of confidence, or unclear purpose. We learn most of these insights through listening to feedback from others that know and see us working, and from those who experience our Use of Self.

Because most OD and leading work is done "in the moment," it is the sensation and choices we make in the moment that helps us the most. Therefore, it is important that we learn how to stay conscious and intentional in that moment, to what we are bringing forth, how we stay on target, and how we self-manage aspects of ourselves that hinder our intended behavior. Use of Self is comparable to a marathon movie, where various themes run through a multitude of storylines that emerge over time. At any given point we only see one frame, but we will fully grasp the storyline as the movie unfolds. Our Use of Self is a lifelong journey guided by our motivation to learn and master how our self is used in service of our work. What appears to others as simply 'showing up' is in fact a complex process, that is defined as such, if we choose to take an intentional approach to our Use of Self. Jamieson et al., (2010) sum this up nicely when they state that Use of Self is, "the conscious use of one's whole being in the intentional execution of one's role for effectiveness in whatever the current situation is presenting."

Survey Tool Methodology

A new survey tool was created based on the survey used in the 2018-2020 global study of Use of Self with OD practitioners (Chueng-Judge and Jamieson, 2020). Items were removed that related only to OD professionals and had non-discriminate factor loadings. Minor modifications were also made to some item wording to better reflect leading and the base concepts in the original conceptualization of Use of Self.

Because the survey had not been used before with leaders, we first ran an exploratory factor analysis to ascertain how the items clustered statistically; we eliminated 39 items that had non-discriminatory loadings or had strong loadings on more than one factor.

Following this analysis, the factors were given new names related to the general content of the items. Since different people named the original factors and the new ones, they are not identical. These were new factors and a new population so we did not assume they would or wouldn't be the same. Yet, they seem to cover the same underlying concepts. This will be further compared later in the discussion.

Sample Demographics

The survey opened in September 2021 and closed on March 2022. The pandemic limited our ability to conduct in-person interviews. We requested participation from people in our network (a convenience sample); those who agreed to participate (78 leaders) were sent an online survey. We defined the population as those whose primary role is leading others, who holds an upper- or middle-level leadership position in any organization, regardless of sector or industry, and who has been working in the US for at least five years. The sample reflected similar demographics as other leadership studies.
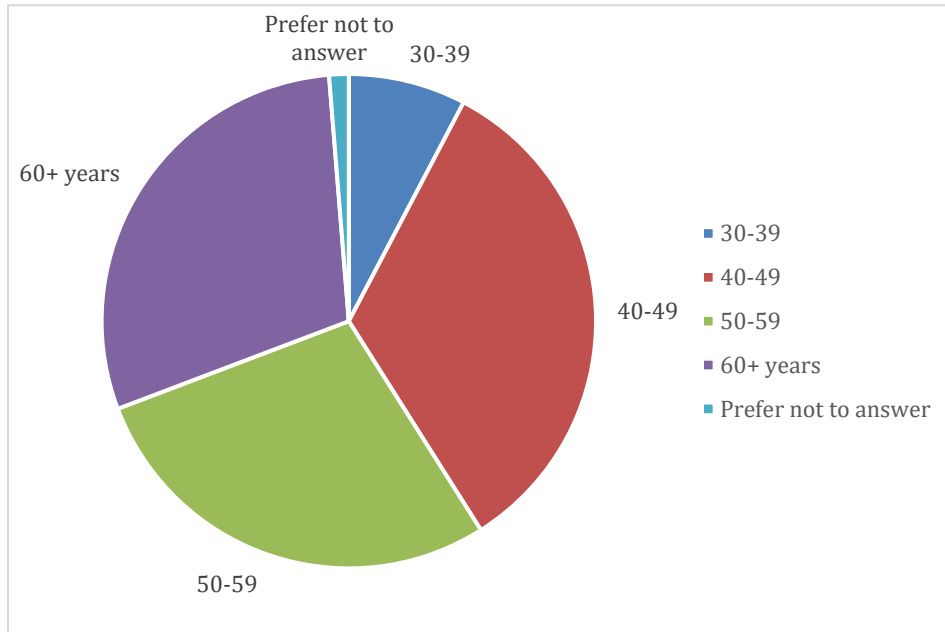
Age, Gender, and Race

Respondents' ages were as follows: 33.3% (26 respondents) were 40-49 years old, 29.5% (23 respondents) were 60+ years old, 28.2% (22 respondents) were 50-59 years, 7.7% (6 respondents) were 30-39 years old, and 1.3% (1 respondent) preferred not to answer.

Figure 1

Age of Respondents

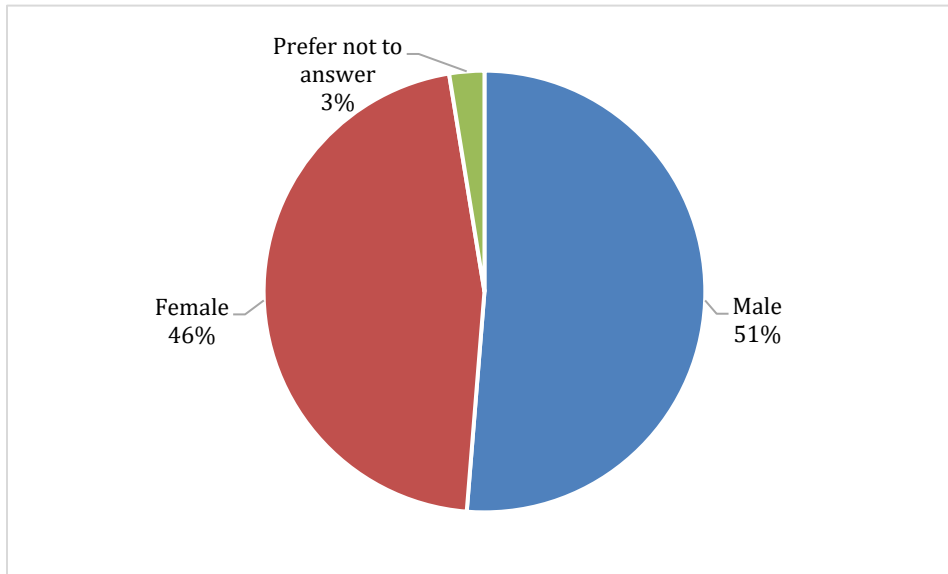51.3% (40) of participants selected male as their response, 46.2% (36) selected female, and 2.6% (2) preferred not to answer.

Figure 2

Gender

For race and ethnicity, 74.4% (58 respondents) selected White, 11.5% (9 respondents) selected Black or African American, 5.1% (4 respondents) selected Asian, 5.1% (4 respondents) selected Hispanic or Latino, 2.6% (2 respondents) selected identified as other, and 1.3% (1 respondent) identified as American Indian, Native American, or Alaska Native. These percentages align with a 2020 review by the New York Times of over 900 government and corporate leaders that found 80% of leaders in the US are White despite the latest Census showing less than that of the US population is White (Lu et al., 2020).

Figure 3

Race and Ethnicity
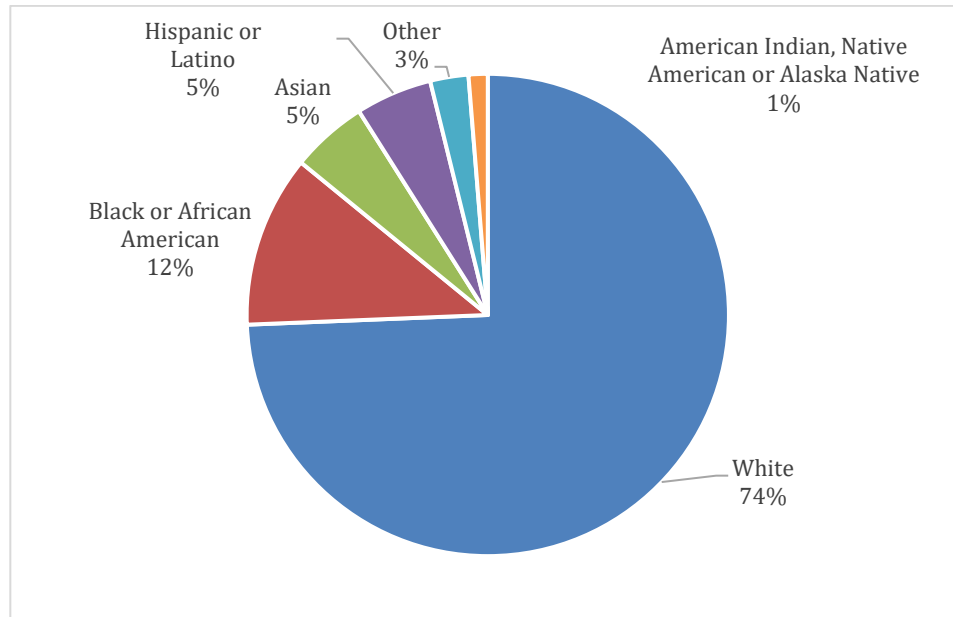
Level of Education

  The education level of respondents showed that 57.7% (45 respondents) earned a master's degree, 21.8% (17 respondents) earned a bachelor's degree, and 17.9% (14 respondents) earned a Doctorate. Most of the leaders are highly educated. At the same time, 1.3% (1 respondent) had some college credit, no degree, or a professional degree, demonstrating that having a formal education is a standard prerequisite for leaders in the US (America's Top CEOs and Their College Degrees, n.d.).

Figure 4

*Highest Level of Education for the Respondents*
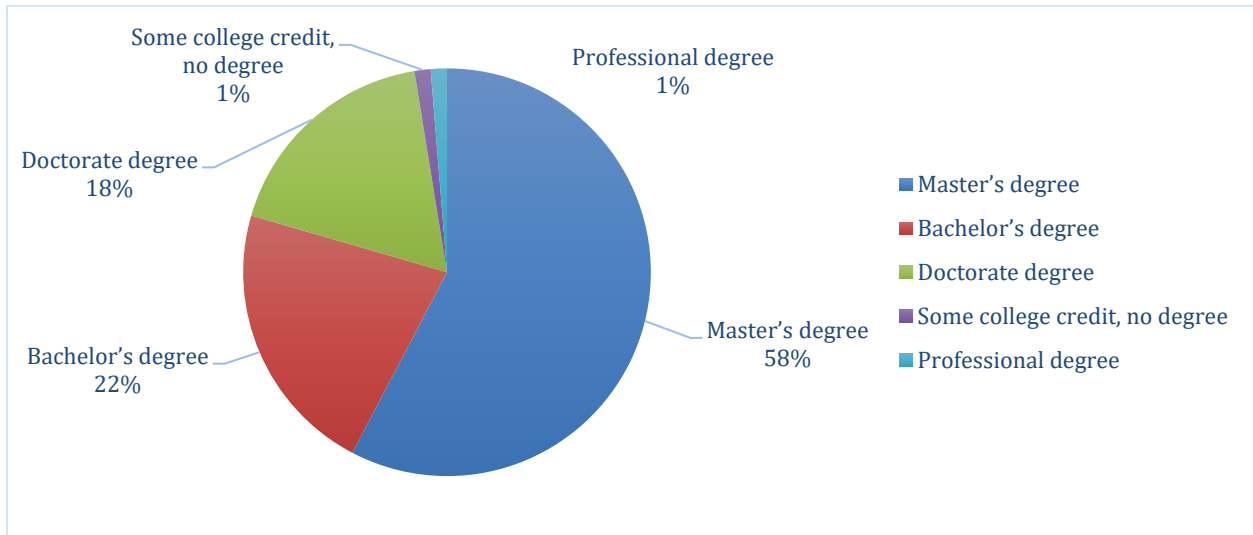
Years of Leading People

Finally, we required the participants to have five years of experience leading people. Most participants had between 6 and 30 years of experience. The lowest 2.6% (2 respondents) percentages had 1-5 and about 5% had 40-50 years of experience leading. The highest numbers had 11-15 years and 21-30 years.

Figure 5

Years of Experience Leading People
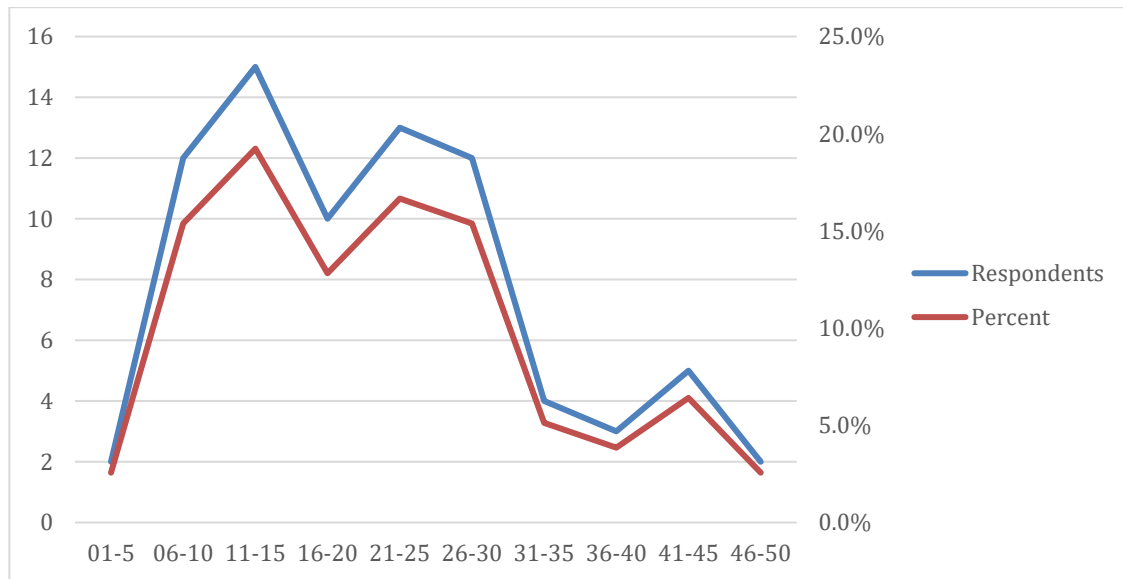
Findings

Items and Factor Loadings

Factor 1: Personal & Situational Awareness in Executing

I am trustworthy (.43)
I understand my motivations and passions (.38)
I can separate serving my needs from others' needs (.36)
My ability to take risks is effective in the situation (.47)
I am capable of being open and honest in my conversations (.37)
I have respect for others regardless of whether they are easy or difficult to work with (.51)
In difficult moments I manage my emotions well (.68)
I pause to understand what is going on in the present and make choices accordingly (.70)
I practice clarifying my intentions for each situation (.49)
I regularly check myself on withholding judgment (.63)
I am able to frame and re-frame issues in service of everyone's understanding (.62)
I can share observations in ways people can hear (.59)
I manage appropriate boundaries and behaviors with others that I work with (.65)

Factor 2: Reflective, Systemic Leading

I work to imbed learning and build capacity in my organization (.58)
I can readily understand the business and context of the organization (.76)
I am a strategic thinker and can extract strategic implications in situations and see possibilities (.59)
I am a systems thinker and can see and understand how an organization, group or team operates (.51)
I am able to sort and organize data to ascertain patterns in situations (.56)
I can experiment on the go and am willing to try new ways of work as needed (.56)
I have tolerance for ambiguity (.42)
I feel comfortable taking evocative and provocative stances when necessary (.38)
I make it a habit to actively reflect on what I am doing in my work (.39)
I give myself feedback to keep working on my own issues (.54)
I devote time to staying knowledgeable about leadership topics (.48)

Factor 3: Interpersonal Relations & Social Interaction

My ability to read others' emotions enables me to be effective in what I do (.86)
I have good behavioral flexibility to adapt to any situation or change (.51)
I have a strong capability to facilitate others' interactions (.54)
I have good insight into the psychological safety needs of people (.65)
Listening to others is important to make sense of situations (.52)
I use my senses and feelings to guide me in my work (.50)
I do well in partnering with others (.32)

I regularly develop open and trusting relationships (.48)
I am sensitive to social dynamics and able to track them (.46)
I notice things going on around me (.50)
I keep improving my ability to notice what's going on in and around me (.43)
Meaningful relationships are essential to my effectiveness as a leader (.39)

Factor 4: Self-Awareness

Managing my biases is an important factor in my effectiveness as a leader (.47)
I learn and grow through developing my self-awareness (.62)
I am aware of my strengths (.36)
I am aware of my less developed areas (.38)
I work to develop my self-awareness (.68)
I invest time and effort in managing my counterproductive patterns of behavior (.56)
I work to understand the influence of myself, others, and the situational context to achieve desired outcomes (.48)
I work to understand how I react to others' actions (.64)

Factor 5: Impact of Best Use of Self

I value humility when working with others (.56)
When I am in flow with others, we lose track of time (.45)
I am more energized (.47)
Productive conversations are occurring because of my actions (.79)
My presence can be felt in the room and is impacting in all directions (.42)
My work at the intersection of self, others and situation is seamless (.61)
Ideas are flowing with little effort (.63)
The whole system is high performing (.58)
I see an increase in the energy of my coworkers as they carry on the work (.48)

Factor 6: Collaborative, Humanistic Behaviors

My behavior shows that I am respectful of others (.51)
I lead in service to others (.54)
I actively cultivate a culture of two-way feedback   (.50)
I am committed to working and learning in partnership with others (.48)
I reflect my concern for employees' well-being in my actions (.42)
I believe that all people have an innate desire to grow and develop (.53)
I work to engage authentically with others (.46)
I intentionally practice holding important conversations (.38)
I focus on finding opportunities to help others learn (.53)

Factor 7: Continuous Self-Care

I practice regular self-care strategies so that I can consistently be my best self for others, even in challenging situations (.71)
I regularly work to manage the impact of my vulnerabilities and fears (.58)
I make plans to take care of myself and regularly engage in self-renewal activities (.77)
I have regular practices to attend to mindfulness and calming focus as I prepare to work (.53)
I work hard in managing and maintaining boundaries in my work (.43)

Factor Scores and Means Organized by Population Demographics

Whole Population (78)

Overall Mean: 3.96

Gender

Male	Female
3.92	4.0

Race & Ethnicity

White	3.90
Black /African American	4.20
Asian	3.91
Hispanic/Latino	4.05
American Indian/Native American/Alaskan Native	4.15
Other	4.41

Age

30-39	3.73
40-49	3.86
50-59	4.01
60+	4.06
Prefer to not answer	3.85

Level of Education

Use of Self in Leadership

Some college credit/no degree	4.70
Bachelor's degree	3.87
Master's degree	3.93
Doctorate degree	4.05
Professional degree	4.20

Years Leading People

1-5	3.86
6-10	3.93
11-15	3.74
16-20	3.81
21-25	4.11
26-30	4.14
31-35	4.29
36-40	3.73
41-45	4.06
46-50	3.32

Factor Scores by Demographic

Factor 1:

Overall Mean: 3.89

Gender

Male	Female
3.93	3.84

Race & Ethnicity

White	3.82
Black. /African American	4.18
Asian	3.84
Hispanic/Latino	3.96
American Indian/Native American/Alaskan Native	4.14
Other	4.43

Age

Use of Self in Leadership

30-39	3.43
40-49	3.72
50-59	4.06
60+	4.04
Prefer to not answer	3.79

Years of Education

Some college credit/no degree	4.54
Bachelor's degree	3.83
Master's degree	3.89
Doctorate degree	3.89
Professional degree	4.43

Years Leading People

1-5	3.64
6-10	3.81
11-15	3.57
16-20	3.61
21-25	3.99
26-30	4.22
31-35	4.23
36-40	3.90
41-45	4.30
46-50	3.50

Factor 2:

Overall Mean: 3.85

Gender

Male	Female
3.81	3.95

Race & Ethnicity

White	3.79
Black/African American	4.16
Asian	3.77

Use of Self in Leadership

Hispanic/Latino	3.93
American Indian/Native American/Alaskan Native	4.18
Other	4.09

Age

30-39	3.56
40-49	3.84
50-59	3.82
60+	3.96
Prefer to not answer	4.09

Years of Education

Some college credit/no degree	4.82
Bachelor's degree	3.77
Master's degree	3.80
Doctorate degree	4.00
Professional degree	4.36

Years Leading People

1-5	3.45
6-10	3.86
11-15	3.54
16-20	3.69
21-25	4.09
26-30	4.14
31-35	4.16
36-40	3.49
41-45	3.90
46-50	3.82

Factor 3:

Overall Mean: 4.04

Gender

Use of Self in Leadership

Male	Female
4.03	4.06

Race & Ethnicity

White	3.99
Black. /African American	4.19
Asian	3.98
Hispanic/Latino	4.17
American Indian/Native American/Alaskan Native	3.83
Other	4.71

Age

30-39	4.01
40-49	3.99
50-59	3.92
60+	4.24
Prefer to not answer	3.83

Years of Education

Some college credit/no degree	5.00
Bachelor's degree	3.96
Master's degree	4.01
Doctorate degree	4.17
Professional degree	4.00

Years Leading People

1-5	4.21
6-10	4.08
11-15	3.86
16-20	3.83
21-25	4.17
26-30	4.07
31-35	4.46
36-40	3.56
41-45	4.33
46-50	3.58

Factor 4:

Overall Mean: 4.08

Gender

Male	Female
4.02	4.16

Race & Ethnicity

White	4.03
Black. /African American	4.31
Asian	3.91
Hispanic/Latino	4.44
American Indian/Native American/Alaskan Native	4.25
Other	4.31

Age

30-39	4.19
40-49	3.96
50-59	4.17
60+	4.14
Prefer to not answer	3.50

Years of Education

Some college credit/no degree	4.38
Bachelor's degree	4.05
Master's degree	4.06
Doctorate degree	4.20
Professional degree	3.88

Years Leading People

1-5	4.13

Use of Self in Leadership

6-10	4.02
11-15	3.99
16-20	4.04
21-25	4.20
26-30	4.23
31-35	4.28
36-40	3.83
41-45	4.23
46-50	2.38

Factor 5:

Overall Mean: 3.94

Gender

Male	Female
3.87	4.03

Race & Ethnicity

White	3.91
Black. /African American	3.99
Asian	3.72
Hispanic/Latino	4.03
American Indian/Native American/Alaskan Native	4.00
Other	4.72

Age

30-39	3.71
40-49	3.93
50-59	4.04
60+	3.92
Prefer to not answer	3.67

Years of Education

Use of Self in Leadership

Some college credit/no degree	4.78
Bachelor's degree	3.83
Master's degree	3.90
Doctorate degree	4.09
Professional degree	4.00

Years Leading People

1-5	3.83
6-10	3.93
11-15	3.79
16-20	4.06
21-25	4.11
26-30	4.09
31-35	4.17
36-40	3.52
41-45	3.53
46-50	3.11

Factor 6:

Overall Mean: 4.26

Gender

Male	Female
4.20	4.35

Race & Ethnicity

White	4.20
Black. /African American	4.49
Asian	4.39
Hispanic/Latino	4.31
American Indian/Native American/Alaskan Native	4.67
Other	4.61

Age

Use of Self in Leadership

30-39	4.02
40-49	4.16
50-59	4.40
60+	4.33
Prefer to not answer	4.00

Years of Education

Some college credit/no degree	4.89
Bachelor's degree	4.17
Master's degree	4.24
Doctorate degree	4.34
Professional degree	4.89

Years Leading People

1-5	4.00
6-10	4.24
11-15	4.17
16-20	4.22
21-25	4.33
26-30	4.29
31-35	4.58
36-40	4.52
41-45	4.13
46-50	4.11

Factor 7:

Overall Mean: 3.43

Gender

Male	Female
3.38	3.48

Race & Ethnicity

White	3.31
Black. /African American	4.08
Asian	3.70

Use of Self in Leadership

Hispanic/Latino	3.25
American Indian/Native American/Alaskan Native	4.00
Other	3.60

Age

30-39	3.07
40-49	3.28
50-59	3.53
60+	3.56
Prefer to not answer	4.20

Years of Education

Some college credit/no degree	4.20
Bachelor's degree	4.18
Master's degree	3.48
Doctorate degree	3.51
Professional degree	3.40

Years Leading People

1-5	3.90
6-10	3.33
11-15	3.14
16-20	3.02
21-25	3.74
26-30	3.75
31-35	4.00
36-40	3.00
41-45	3.64
46-50	1.60

Summary Analysis

The new factor analysis created 7 factors, while the original produced 5.

Original Factors	New Factors
1. Using Cognitive and Emotional Skills with Courage to Serve Dynamic Systems	1. Personal & Situational Awareness in Executing
2. Attention to Relationship-Centric Values & Behaviors	2. Reflective, Systemic Leading
3. Self-Management in Emerging Situations	3. Interpersonal Relations & Social Interaction
4. Continuous Development of Self & Other Awareness	4. Self-Awareness
5. Experiences of Best UoS Impact	5. Impact of Best Use of Self
	6. Collaborative, Humanistic Behaviors
	7. Continuous Self-Care

One original factor was Attention to Relationship-Centric Values and Behaviors, which is covered in the new factors Collaborative, Humanistic Behaviors, and Interpersonal Relations & Social Interaction. There are some clear overlaps between the original and new factors, such as the two 4's and the two 5's. Deeper study will help to get better understanding of the item loading by factors.

Also, the overall population means in the original study was 3.85, in this study it is 3.96. Male-female means were 3.85 for both, and the new M-3.92 and F-4.0. were slightly different.

The means for some of the race sub-groups are higher than others. This could be a useful area to research further, perhaps through qualitative methods of lived experiences by the different racial and ethnic groups. The means also generally rise with age, levels of education, and years of leading, which supports similar findings from the first study. This suggests that Use of Self develops over time, experiences, and continued learning. A few of the means appeared as outliers: the 4.70 for some college/no degree being the highest; the 36-40 and 46-50 years of leading being lower that the increasing means with years. It is important to remember that in this

sample, some of the sub-samples are too small to count with any high validity, as they can be swayed by very few participants.

The whole population means for each factor can be compared by highs and lows.

Factor 1	Factor 2	Factor 3	Factor 4	Factor 5
3.80	4.07	3.75	3.85	3.68

In the previous study, Factor 2 was the highest: Attention to Relationship-Centric Values & Behaviors. The new factors had similar means.

Factor 1	Factor 2	Factor 3	Factor 4	Factor 5	Factor 6	Factor 7
3.89	3.85	4.04	4.08	3.94	4.26	3.43

In the new factors, Factor 6- Collaborative, Humanistic Behaviors, was the highest (4.26), and Factor 4- Self-Awareness (4.08) and Factor 3- Interpersonal Relations & Social Interaction (4.04) followed. The Self-Awareness in new study seems to be higher than the related one in the old study which might mean that feeling more self-aware may be more common with leaders than with change agents. This is another area, rich in research questions.

There are many more details in the sub-population demographic factor means with rich possibilities for further study and analysis.

What seems to stand out in both studies:

- are the high importance of relational attention, development, and practice;

- the importance of self-awareness;

- the value of learning, experience, and practice; and

- the equality of genders in using self.

These also match years of anecdotal experience and exchanges with many professionals who have worked with both change agents and leaders. Both studies also raise many more interesting research questions needed to further develop that work.

Implications

How Does the Research Help to Explain Use of Self?

This being the second study on this topic, it supports much of the conceptual work that is helping to clarify and develop Use of Self as an area of analysis. The Use of Self is the core element in how effective we are in successfully executing our intended roles. It is built on:

- awareness of who we are;

- clarity of our intentions;

- our consciousness to the situation;

- our choices and,

- the purposeful management of ourselves in actions.

In this study the awareness showed up relatively high, as a distinct element. Intentions were not separated out but relate well with the factors of Personal and Situational Awareness from this study and the Cognitive and Emotional Skills with Courage in Serving Dynamic Systems from the original study, which provide some of the data to build on our intentions. Consciousness is part of our Personal & Situational Awareness in Executing, Reflective, Systemic Leading and is significant in our Presence. Choices are what we see thru the factors of Personal & Situational Awareness in Executing, Reflective, Systemic Leading and Self-Awareness. Managing ourselves purposefully in our actions shows up through the original study factors of Self-Management in Emerging Situations and Cognitive and Emotional Skills with Courage in Serving Dynamic Systems, Situational Awareness in Executing, Reflective, and Systemic Leading from this study.

Implications for Leaders

Implications of developing strong Use of Self-knowledge for leaders is a win-win. With the growing complexities and speed of change in a VUCA world, leaders who understand the factors that make up the "self" can enter an environment living their most authentic, impactful, and empathetic selves. Any time a leader spends in a mindful and reflective exercise to gain a deeper understanding of what makes up the "self" is an exercise that will help to uncover the distinctive configuration of that leader's set of common elements (i.e., personality factors, styles, attitudes, identities, knowledge & skills), elements defined in Jamieson et al., (2019), Use of Self Model. Elements that everyone possesses.

The outcome of this work uncovers strengths, gaps, and it reveals something as unique as our thumbprint. It is not static and is constantly in flux as we act on our environment, and it acts on us (Jamieson et al., 2019). Therefore, implementing a practice that sets a leader on a lifelong journey of development in the Use of Self can only be seen as a gift to oneself, others, and the systems they operate in and influence.

Leaders are responsible for creating and maintaining an atmosphere where employees can learn, innovate, and flourish in psychological safety. Harvard Business School professor Dr. Amy Edmonson (2012, p. 118) describes psychological safety as "a belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes". That type

of safe environment depends on how a leader uses her or himself as an effective instrument in guiding, supporting, and leading their staff. The evolution and growth of a leader who learns to use oneself and guides others with empathy, compassion, passion, vulnerability, and transparency, results in becoming a trustworthy model and leader who others seek to emulate. The only way to move towards that type of leadership is to learn to trust one's resources, make a discerning judgment of the 'here and now,' be choiceful in one's behavior, and determine what may work best in a given situations (Cheung-Judge, 2012). This outcome requires a complete search of our shadow selves, a deep dive to evolve self-awareness and discover the personas that makeup who we are. As such, adding a practice of mindfulness and intentionality is needed to hone one's ability to notice and process both external and internal data. This work is challenging, but the outcome is worthwhile.

Currently, we are bombarded by a continuous flow of data, of which much is noise and not useful for our purposes in the current situation. Thus, noticing internal data requires quieting the mind and turning our attention to our bodies (Jamieson et al., 2019, p. 12). One method to help achieve clarity and alignment between our thoughts, feelings, and physical responses, is to practice mindful meditation. Mindfulness brings multiple benefits, such as reduced anxiety, stress, better memory, cognition, stronger relationships, better health, etc. The more we connect with ourselves, the more we know who we are, the easier it is to connect with others effectively and authentically. Another effective method to help us quiet the mind, is to practice journaling. We can set aside personal time for reflection on past experiences (positive and negative) and help us process and connect with the learning opportunities. For a more structured way to hone one's self-knowledge, an exercise such as Zaldivar's (2020) Unique Cultural Lens (UCL), may be extremely helpful. The UCL process allows us to uncover "one's own set of perception filters

(biases) accumulated over a lifetime. The UCL reflects the rich ancestral, cultural, educational, and experiential heritage that emerges from and informs who we are now. These filters define the authentic self, influence how one perceives and interacts with the world, and how they affect our decisions. This process helps uncover the unknown filters and solidifies the known.

Use of Self is not simply a tool one can pick up, use, and then set aside until the next time. Use of Self is WHO we are as a person and as a leader. "The whole self, hands, heart, mind, and spirit are the tools a leader uses to do everything in their work. To authentically represent that true self and use the tools that reside deep within, they must be understood and used with intentionality." (Minahan & Forester 2019).

Implications For Professionals Who Develop, Educate, or Coach Leaders

We are in an unprecedented era of change in the way we work. Anyone who is a leader of others in the workplace is facing challenges while navigating a world changed by a global pandemic. These challenges include:

- how to structure a return to a brick-and-mortar office;

- how to manage remote workers in a hybrid workplace,

- how to mentor staff,

- how to leverage and develop emotional intelligence

- how to find work/life balance for ourselves, and our staff.

We find ourselves in a rapidly shifting corporate/environmental culture; we have collective awareness and recognition of indigenous and ethnic cultures; and the impact and importance of the black lives matter and #metoo movements. Inclusion and diversity for leaders have never been more in the forefront. Helping leaders see themselves and their leadership behavior is crucial to the development of a vital workforce. What is outlined here are

components of Use of Self as illustrated in several models that impact the development of programs or conversations with and for leaders.

As Jamieson, et.al., 2010 state, all of the best and worst parts of ourselves, known and unknown, are who we are and can show up at any time as we lead and interact with others regardless of the circumstance. As stated previously, the purpose of Use of Self is to be able to execute effectively, for the presenting situation, without personal interference such as bias, personal triggers and avoidance with enough consciousness and presence to have clear intentionality and choices.

A comprehensive career development plan tailored to the specific needs of the client, should include focus on Use of Self to help a leader attain effective and successful execution of their intended roles. A complete program begins with an assessment to define the level of awareness of who the leader is; the clarity of their intentions; their choices, the purposeful management of their actions, and their level of consciousness of situations. With this information, a coach can concentrate on developing a curriculum that helps to mitigate gaps or weaknesses that the leader self-identifies, or observations made by the coach.

Coaches and career development professionals that assist a leader to attain self-realization and internal focus, can share fruitful developmental conversations that lead to a continual platform for customized learning activities. The implication of self-awareness versus prescriptive learning is that the learner is more invested in their behavior and how it affects others.

Elements of Self come from a variety of sources: our families, education, and religion as well as what an individual gleams from their role models and their own success. Along a time, continuum, the Self is always a work in progress. Touchstone points are personality traits,

characteristics, style preferences, attitudes, values, gender/ racial/ cultural/ professional identities, as well as knowledge and skills. As stated before, Zaldivar's (2020) Unique Cultural Lens (UCL) exercise, can guide this process of discovery.

Desired outcomes from this type of work include:

- being more effective, impactful, and successful in specific roles;

- being able to provide the best service/help to others;

- understanding oneself and what we bring to each situation;

- knowing how to manage and take care of oneself;

- continual learning from experiences;

- and the attainment of a more knowledgeable Self.

Understanding the value of the Use of Self guides leaders to more consciously think through their responsibility to communicate their (and the organizations) vision, and to effectively attract others to share that same purpose or goal. Clarifying personal use of power and influence helps a leader effectively use their insights to process and to build relationships that are based on trust, commitment, and well-being.

Use of Self Model: Competencies
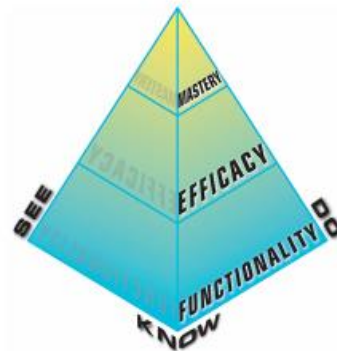
The more a leader focuses on their Use of Self, the more effective they will be in managing inclusivity, participation, motivation, and productivity of others. There are three competencies within the Use of Self model. They are: Seeing, Knowing, Doing, and three levels of

development: Functionality, Efficacy and Mastery. When coaching or developing leaders it will be beneficial to extract the three competencies to illustrate one's capabilities in each competency

In a deeper dive, Seeing involves what is taken in via our six senses. It is the competency in being aware of the world around the leader and their ability to take in as much data as possible to provide meaning in a situation. Additionally, Social Sensitivity involves the type of data seen and taken in from the social systems that make up the present situation. Knowing involves the ability to make sense of what is seen; it uses a combination of knowledge and experience to organize information and draw hunches to make conclusions. Multiple ways of knowing allows a leader to leverage any method that gives them meaning and confidence to act. Doing is the capability for executing a full range of behavioral/action choices; it encompasses both knowing the options and having the behavioral flexibility and personal courage to be able to choose and execute on what's most appropriate in each situation.

Functionality is a stage of knowing how to and what to do in terms of basic aspects of Seeing, Knowing, and Doing. Concentration and paying attention to "doing the right thing" by following appropriate steps or other criteria suited to the presenting situation, lead to trust of the material, method, technique, or concept. Efficacy is a further state of development marked by an increased 'flow' to our actions, and an ease of use of any aspects of Seeing, Knowing, and Doing. It is when the person starts to own what they are doing as coming from them and not just what came from a book, friend, coach, or teacher. A leader trusts themselves in the use of data, meaning, and action. They demonstrate higher levels of confidence; the sequence of taking in, making meaning, and acting becomes more seamlessly integrated.

Mastery is the highest stage of development and is characterized by fully integrated and seamless work. When at the mastery level, one's presence has greater impact. Seeing, Knowing,

and Doing have become fully integrated, simultaneous, and effortless back-and-forth activities with little conscious decision making. One's own self-awareness has opened ego-free space for professional work; intentionality and end purpose are intertwined and unencumbered allowing the leader to trust in the process and outcome, and their role in it.

Coaching can enhance the importance of "noticing" that comes with consciousness and presence. Noticing uses all of the leader's senses; continuous practice (and feedback) develops this into an intrinsic skill that is done without initial judgments. It is the role of the coach to encourage a leader to be "situationally aware" through the process of noticing and being present. The Use of Self also notices what is done and how the situation impacts others.

One's own perception of themselves is rarely complete. "It takes two to see one". Without self-awareness/self-understanding, individuals are ignorant of the impact of many of their actions, (e.g., causality, motivations, drivers, intentions). Without valid feedback, leaders are flying blind on how effective and impactful they are, and who they are. Use of Self can be an integral component of a leader's success.

In coaching, there are numerous queries that can be posed to a leader to maximize their understanding and internalization of Use of Self, including:

- What do you know that gets in your way of being your best self?

- What is something about yourself that you always need to manage?

- When do you experience vulnerability?

- What do you do exceptionally well?

- What is something about yourself that often surprises you, be it helpful or not?

Coaches and career development professionals that develop learning activities or structured programs for leaders, often rely on a variety of assessment tools such as:

Use of Self in Leadership

- 360 Degree Feedback

- Birkman

- Coaching Culture Assessment

- DISC

- Gallup's Strengths Finder

- IHHP (Institute for Health and Human Potential) Emotional Intelligence (EQ) Assessment and Performing Under Pressure Assessment

- Mentoring

- Myers-Briggs Type Indicator (MBTI)

Adding Use of Self work into the mix, adds a method to stimulate conversations and explore what, why, and how of a particular behavior. Each type of the assessment listed above, tends to shine a light on different aspects of who we are. Additional methods to aid in developing/managing use of self-include:

- T-groups, self- development groups

- Assessment based workshops (some previously mentioned)

- Therapies, counseling

- Support or informal groups with open, honest feedback,

- Reading

- Practice with reflective methods to internalize experiential learnings

With further development, this Use of Self-study may help in developing a research-based self-scoring assessment instrument and/or a 360 version that can help people get a solid start in highlighting their strengths and the less developed areas of themselves. This tool will align with

other major instruments to pick up other deeper levels of information that can strengthen and compliment Use of Self.

Potential Future Research Work

As researchers interested in propagating the importance of expanding Use of Self work, it is deeply encouraging to see these recently completed studies and others that are underway:

- Neil Bauer (University of St Thomas) completed his dissertation on developing and piloting a workshop series on Use of Self for law enforcement officers.

- Nicole Zwieg Daly (University of St Thomas) completed her dissertation on Examining Use of Self-Competency in Undergraduate Students: Its Relationship to Interpersonal Communication and Soft Skill Development.

- Jen Traxler (Bowling Green State University) has completed her dissertation developing and validating a new instrument covering the three core elements of self-awareness, situational awareness, and intentional actions. This study included a variety of people in a variety of workplace situations.

- Lillian Vu (University of St Thomas) has started a new study on the success of Hmong women social entrepreneurs, who have overcome many barriers to understand their lived experience and practice, using Use of Self elements as a category scheme.

- Adaeze Ochieze (Bowling Green State University) is working on a deeper study of self-awareness within the OD professional community.

- Doug Bellah (Bowling Green State University) is proposing using three elements of self: self-efficacy, self-agency, and self-confidence in relating to how people prepare for entering and showing up in situations.

Use of Self in Leadership

Additionally, new questions and types of research could be useful in further developing this concept in the education and development of anyone, in any key role that impacts people. There is further need to:

- Lead more qualitative studies of Use of Self as concept and its elements, to bring lived experiences and collect different data to understand how people manage themselves in executing their roles. More diverse perspectives, rationales, motivations, fears, and internal insights would be significant in our understanding of Use of Self.

- Understand the differences across racial, identity, and cultural differences in all aspects of Use of Self.

- Lead studies that focus on current populations of therapists, social workers, nurses, teachers, and others so we may attain a wider perspective and knowledge of Use of Self.

- Relate individual Use of Self scores to other important aspects of effectiveness, outcomes, and impacts (e.g., satisfaction with the person in the role, business results, change results, engagement levels, etc.).

- Refine how Use of Self can be integrated into education curricula and leadership development programs.

- Study teams of leaders who are working on significant projects, that include Use of Self reflection, and that establish at the onset, a culture that is accepting and open to feedback so they may help their team focus on how each can help or hinder, lead, contribute, collaborate, etc.

We hope that this study of the Use of Self in leadership encourages the continued work and exploration of the benefits that self-awareness can bring not only to the person who commits to this lifelong effort, but to all who s/he impacts in their personal and professional journey.

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Use of Self in Leadership Research Study

Thank you for participating in this research. It is the first of its kind and will help to clarify how leaders manage to bring their best selves to their role and execute leadership as they intend. It will augment other leadership theories and concepts about what creates the best leadership and how the leader, as a person, has influence on how they interpret, assess, think, choose, decide, behave, and deal with any tasks, inspirations, and difficulties in their role.

For this study, we are defining appropriate participants as people whose primary role is leading others, has been in such roles for a minimum of 5 years, operates in middle or higher levels within their organizations, works in any sectors, industries, or types of organizations and a cross-section of demographics, and is working in the US.

The first section of the survey contains a Research Consent Form that will need your agreement to participate. The second section captures demographic information useful in categorizing any sub-groups of the research population. Then the actual survey will follow.

The questions have scales to select from that will ask you how you do or feel about different aspects of your work, across several categories or situations, such as how much or how often you do certain things in the execution of your leadership and how you experience different aspects of your impact on others and experiences related to your outcomes and optimal use of yourself.

Consent for Survey

The purpose of this new research study, the first of its kind, is to better understand how the leader, as a person, uses themselves in the best way to execute their leadership. The concept comes from previous research within the behavioral sciences related to other roles. The desired population is anyone whose primary role is leading others, with positions in the middle or higher levels, in any type of organization, any sector or industry, and all demographics. For this study, we do want people working in the US with at least 5 years of experience in leadership.

If you agree to participate, I will ask you to answer several survey questions focused on how leaders process their intentions, choices, and decisions in executing their leadership. The survey should only take 30-45 minutes to complete.

The study has no known risks. The entire study will be confidential, so your name, email and data will never be shared in any form attached to your data or this study. All analysis will be performed in collective group

formats. As a participant, you will be sent the report, as soon as it is completed, probably early 2022.

The benefits for participating in the study include an opportunity to think about how you practice your leadership, and you will receive a report from the study.

While we can never guarantee complete confidentiality in online research, the records of this survey will be kept as confidential as possible. In any sort of report I publish, I will not include information that will make it easy to identify you.

Your participation in this study is entirely voluntary. Your decision whether or not to participate will not affect your current or future relations with the University of St. Thomas. If you decide to participate, you are free to withdraw before the survey is submitted. You may withdraw by closing the survey on your computer. You are also free to skip any questions asked.

This study is being conducted by: Dr. David W. Jamieson, Executive Fellow, Opus College of Business (jami1396@stthomas.edu (mailto:jami1396@stthomas.edu)). This study was approved by the Institutional Review Board at the University of St. Thomas.

You may ask any questions you have now and any time during or after the survey by contacting the researcher. You may contact me at: jami1396@stthomas.ed; 612-757-3373. You may also contact the University of St. Thomas Institutional Review Board at (651) 962-6035 or muen0526@stthomas.edu (mailto:muen0526@stthomas.edu) with any questions or concerns.

1. By clicking "Agree," I consent to participate in the study. I am at least 18 years of age.

○ Agree

○ Disagree

Survey Demographic

Please fill in your complete contact information if you agree to a possible follow-up telephone interview or wish to receive the summary results. Otherwise, you may omit this information. All information will be kept securely protected and no personal information will be revealed in the study results.

2. First Name

3. Last Name

4. Email

5. Phone Number

6. My gender/self-identify

○ Woman

○ Man

○ Non-binary

○ Prefer not to answer

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7. My race/ethnicity/self-identify

○ American Indian, Native American or Alaska Native

○ Asian

○ Black or African American

○ Hispanic or Latino

○ Native Hawaiian or Pacific Islander

○ White

○ Other

○ Prefer not to answer

8. My age group

○ 20-29

○ 30-39

○ 40-49

○ 50-59

○ 60+ years

○ Prefer not to answer

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9. My highest level of education

○ High School graduate, diploma or the equivalent

○ Some college credit, no degree

○ Associate degree

○ Bachelor's degree

○ Master's degree

○ Professional degree

○ Doctorate degree

○ Prefer not to answer

10. Years of leading people

○ 1-5

○ 6-10

○ 11-15

○ 16-20

○ 21-25

○ 26-30

○ 31-35

○ 36-40

○ 41-45

○ 46-50

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Section A: Characteristics and Values

11. How well do the following characteristics and values describe me in my professional work?

Not at All   Rarely   Sometimes   Very Well   Almost Always

Not at All means that this characteristic/value is just not part of you
Rarely means this characteristic/value shows up or would describe me very rarely, from time to time
Sometimes means that that a characteristic/value is common for me some of the time
Very well means the characteristic/value is usually present for you
Always means the characteristic/value is common, dominant and consistent with you

	Not at All	Rarely	Sometimes	Very Well	Almost Always
I am trustworthy	○	○	○	○	○
My behavior shows that I am respectful of others	○	○	○	○	○
I lead in service to others	○	○	○	○	○
Meaningful relationships are essential to my effectiveness as a leader	○	○	○	○	○
I value humility when working with others	○	○	○	○	○
Fairness and Justice are important values to me	○	○	○	○	○
Diversity, inclusion and equality influence my work	○	○	○	○	○
Managing my biases is an important factor in my effectiveness as a leader	○	○	○	○	○
I actively cultivate a culture of two-way feedback	○	○	○	○	○

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Use of Self in Leadership

	Not at All	Rarely	Sometimes	Very Well	Almost Always
I learn and grow through developing my self-awareness	○	○	○	○	○
In challenging situations I lead with confidence	○	○	○	○	○
I am committed to work and learn in partnership with others	○	○	○	○	○
I reflect my concern for employee's well-being in my actions	○	○	○	○	○
I believe that all people have an innate desire to grow and develop	○	○	○	○	○

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Section B: Continuous Self Work (inner work, self-management habit, self-care)

12. How often are the following personal self-work actions part of your professional work?

Very Rarely   Occasionally   Sometimes   Very Often   Almost Always

Very Rarely means that this statement is very rarely true for you
Occasionally means that the statement is sometimes true but not very often
Sometimes means that the statement is true but not in a regular or consistent manner
Very Often means this statement is a major aspect of your work
Almost Always means the statement is consistently and regularly true for you, most of the time

	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
I am aware of my strengths.	○	○	○	○	○
I am aware of my less developed areas.	○	○	○	○	○
I understand my motivations and passions	○	○	○	○	○
I work to develop my self-awareness	○	○	○	○	○
I work to engage authentically with others	○	○	○	○	○
I invest time and effort in managing my counterproductive patterns of behavior	○	○	○	○	○
I work to understand the influence of myself, others, and the situational context to achieve desired outcomes	○	○	○	○	○
I practice regular self-care strategies so that I can consistently be my best self for others, even in challenging situations	○	○	○	○	○

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Use of Self in Leadership

	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
In real time I can manage myself to develop multiple options and make intentional choices	○	○	○	○	○
I work to understand how I react to others' actions	○	○	○	○	○
I regularly work to manage the impact of my vulnerabilities and fears	○	○	○	○	○
I stay alert to my blind spots and how they affect others	○	○	○	○	○
I can separate serving my needs from others' needs	○	○	○	○	○

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Section C: Practice Skills, Capabilities and Competencies

13. How well do I use the following practice skills, capabilities, and competencies to support the effectiveness of my leadership?

Poorly   Adequately   Fairly Well   Very Effectively   Masterfully

Poorly means that practice skill/capability/competency is hard or just not part of you
Adequately means you can use this practice skill/capability/competency from time to time
Fairly Well means that this skill/capability/competency is a regular part of your practice
Very Effectively means this practice skill/capability/competency is regularly present a strength for you
Masterfully means this practice skill/capability/competency is seamless, dominant and consistent with you

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
My ability to take risks is effective to the situation	○	○	○	○	○
I can experiment on the go and am willing to try new ways of work as needed	○	○	○	○	○
I have tolerance for ambiguity	○	○	○	○	○
I am capable of being open and honest in my conversations	○	○	○	○	○
The clarity of my intentions guides my actions	○	○	○	○	○
I have respect for others regardless of whether they are easy or difficult to work with	○	○	○	○	○
In difficult moments I manage my emotions well	○	○	○	○	○

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Use of Self in Leadership

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
I pause to understand what is going on in the present and make choices accordingly	○	○	○	○	○
I practice clarifying my intentions for each situation	○	○	○	○	○
I consider both my desired and unintentional impacts when making choices and taking actions	○	○	○	○	○
I use inquiry, i.e., I ask questions, in relationship building	○	○	○	○	○
I intentionally practice holding important conversations	○	○	○	○	○
I explicitly identify the range of situational choices available to me	○	○	○	○	○
I regularly check myself on withholding judgement	○	○	○	○	○
I am effective in keeping my emotions separate from the work of the organization	○	○	○	○	○
I know how to manage my public personas/identities and when they are appropriate or not	○	○	○	○	○
I take in all forms of data from others and situations, using all of my senses	○	○	○	○	○

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Use of Self in Leadership

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
I feel comfortable to take evocative and provocative stances when necessary	○	○	○	○	○
I am sensitive to social dynamics and able to track them	○	○	○	○	○

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14. How well do I use the following practice skills, capabilities, and competencies to support the effectiveness of my leadership?

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
I am able to sort and organize data to ascertain patterns in situations	○	○	○	○	○
I regularly develop open and trusting relationships	○	○	○	○	○
I am a systems thinker and can see and understand how an organization, group or team operates	○	○	○	○	○
I am a strategic thinker and can extract strategic implications in situations and see possibilities	○	○	○	○	○
I can readily understand the business' and context of the organization	○	○	○	○	○
I do well in partnering with others	○	○	○	○	○
I keep improving my ability to 'notice' what's going on in and around me	○	○	○	○	○
I find staying present in the here and now easy to do	○	○	○	○	○
I use my senses and feelings to guide me in my work	○	○	○	○	○

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Use of Self in Leadership

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
I focus on finding opportunities to help others learn	○	○	○	○	○
My ability to read other's emotions enables me to be effective in what I do	○	○	○	○	○
I have good behavioral flexibility to adapt in any situation or changes	○	○	○	○	○
I have a strong capability to facilitate others' interactions	○	○	○	○	○
I manage appropriate boundaries and behaviors with others that I work with	○	○	○	○	○
I can share observations in ways people can hear	○	○	○	○	○
I am able to frame and re-frame issues in service of everyone's understanding	○	○	○	○	○
I see situational dynamics and realities clearly	○	○	○	○	○
I have good insight into the psychological safety needs of people	○	○	○	○	○

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15. How well do I use the following practice skills, capabilities, and competencies to support the effectiveness of my leadership?

	Poorly	Adequately	Fairly Well	Very Effectively	Masterfully
I can align my intent and impact well in complex situations	◯	◯	◯	◯	◯
Listening to others is important to make sense of situations	◯	◯	◯	◯	◯
I work to imbed learning and build capacity in my organization	◯	◯	◯	◯	◯

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Section D: Lifelong Development Practices

16. How often do the following practices occur in my professional work?

Very Rarely   Occasionally   Sometimes   Very Often   Almost Always

Very Rarely means that this practice operates hardly at all for you
Occasionally means you do have this practice but not often
Sometimes means you do have this practice fairly often but not regularly
Very Often means you do have this practice and it is a major part of your work
Almost Always means this practice happens regularly, consistently, most of the time

	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
I make it a habit to actively reflect on what I am doing in my work	○	○	○	○	○
I often check myself on how my habits and default reactions impact on the needs of the people I lead	○	○	○	○	○
I consciously learn from others' behaviors and reactions to me	○	○	○	○	○
I make plans to take care of myself and regularly engage in self-renewal activities	○	○	○	○	○
I have regular practices to attend to mindfulness and calming focus as I prepare to work	○	○	○	○	○
I actively seek feedback on myself and my impact	○	○	○	○	○
I give myself feedback to keep working on my own issues	○	○	○	○	○
I learn from my experiences to improve myself	○	○	○	○	○

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Use of Self in Leadership

	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
I continuously work through my own vulnerabilities and fears	○	○	○	○	○
I consciously work on developing my presence	○	○	○	○	○
I intentionally develop my thinking, perceiving, and feeling capabilities	○	○	○	○	○
I notice things going on around me	○	○	○	○	○
I devote time to stay knowledgeable about leadership topics	○	○	○	○	○
I work hard in managing and maintaining boundaries in my work	○	○	○	○	○
I work to expand my scope of understanding different paradigms, world views, and perspectives	○	○	○	○	○

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Section E: Experiences When Using My Best Self

17. How often do the following experiences occur in and around me when I am using my best self?

Very Rarely   Occasionally   Sometimes   Very Often   Almost Always

Very Rarely means that this practice hardly occurs in and around me
Occasionally means that this experience does occur in and around me but not often
Sometimes means experience occurs in and around me often but irregularly
Very Often means this experience is a major occurrence in and around me in my work
Almost Always means this experience occurs in and around me consistently, most of the time

	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
When I am in flow with others, we lose track of time	○	○	○	○	○
I am more energized	○	○	○	○	○
All my personal resources are sharp and available to carry out the work in any given situation	○	○	○	○	○
Productive conversations are occurring because of my actions.	○	○	○	○	○
My presence can be felt in the room and is impacting in all directions	○	○	○	○	○
My work at the intersection of self, others and situation is seamless	○	○	○	○	○
Others are engaging fully	○	○	○	○	○
Ideas are flowing with little effort	○	○	○	○	○

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	Very Rarely	Occasionally	Sometimes	Very Often	Almost Always
The whole system is high performing	○	○	○	○	○
The impact of my work is occurring in real time	○	○	○	○	○
I see an increase in the energy of my coworkers as they carry on the work.	○	○	○	○	○

18. Is there anything else you would like to share?

[text box]

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