Welcome to
CALTRIN
California Training Institute
Collaborative Leadership: Aligning Goals, Driving Results
THE TRAINING WILL BEGIN SHORTLY! WHILE YOU'RE WAITING...
Icebreaker Question
(answer in the chat)
Think about the best team you've ever been part of—what made it so effective?
Survey & Certificate of Completion
Available following the training.
Connect With Us!
VISIT CALTRIN.ORG & SCAN TO LEARN MORE

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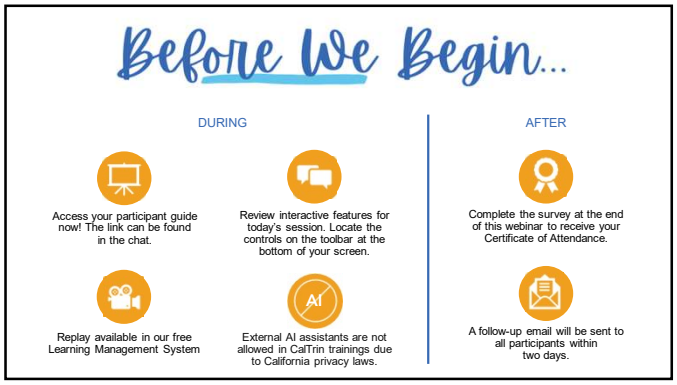
Before We Begin...
DURING
AFTER
Access your participant guide now! The link can be found in the chat.
Review interactive features for today's session. Locate the controls on the toolbar at the bottom of your screen.
Replay available in our free Learning Management System
External AI assistants are not allowed in CalTrin trainings due to California privacy laws.
Complete the survey at the end of this webinar to receive your Certificate of Attendance.
A follow-up email will be sent to all participants within two days.

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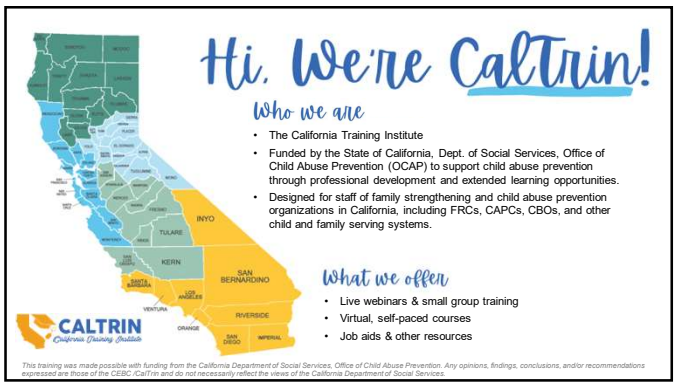
Hi, We're CalTrin!
Who we are
The California Training Institute
Funded by the State of California, Dept. of Social Services, Office of Child Abuse Prevention (OCAP) to support child abuse prevention through professional development and extended learning opportunities.
Designed for staff of family strengthening and child abuse prevention organizations in California, including FRCs, CAPCs, CBOs, and other child and family serving systems.
What we offer
Live webinars & small group training
Virtual, self-paced courses
Job aids & other resources
INYO
TULARE
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SAN BERNARDINO
RIVERSIDE
VENTURA
ORANGE
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This training was made possible with funding from the California Department of Social Services, Office of Child Abuse Prevention. Any opinions, findings, conclusions, and/or recommendations expressed are those of the CEBC /CalTrin and do not necessarily reflect the views of the California Department of Social Services.

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UPCOMING TRAININGS
mark your calendars!
Visit caltrin.org to view and register for upcoming webinars or workshops:
01/15: Working Effectively with Substance Affected Families
01/16: Protective Factor of the Month: Overview
01/22: Moving Beyond DEI 101 (3-Part Series) 01/22, 02/05, and 02/19
01/23: From Zero to Thrive! Nurturing Resilience in Families from Pregnancy through Early Childhood
02/04: Culturally Responsive Collaboration with Tribes to Enhance Positive Outcomes in Serving Native American Families
02/13: Debriefing and Mutual Support

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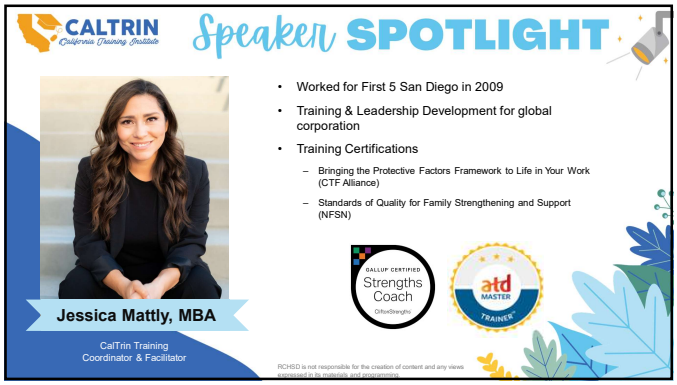
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Speaker SPOTLIGHT
Jessica Mattly, MBA
CalTrin Training Coordinator & Facilitator
Worked for First 5 San Diego in 2009
Training & Leadership Development for global corporation
Training Certifications
Bringing the Protective Factors Framework to Life in Your Work (CTF Alliance)
Standards of Quality for Family Strengthening and Support (NFSN)
GALLUP CERTIFIED Strengths Coach
atd MASTER TRAINER
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Collaborative Leadership: Aligning Goals, Driving Results
Presented by CalTrin

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LET'S LEARN ABOUT YOU!

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RESOURCES

Note-taking PPT Slides

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AGENDA

- **Set a clear direction** that inspires and motivates.
- **Align goals across teams** to work better together.
- **Build trust and commitment** for stronger collaboration.
- **Break down barriers** between teams to drive innovation and results.

Breakout room discussion required

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Defining Collaborative Leadership

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BREAKOUT: DEFINE COLLABORATIVE LEADERSHIP & SUCCESS

- Who are you trying to organize or bring together?
- What would successful or efficient collaboration look like?

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Setting Clear Direction

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Everyone is mission-critical.

Leaders must be trusted guides.

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CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

15

CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

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CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

17

CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

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CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

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CLARITY = CONFIDENCE

What? How? Who?

When? WHY?

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WHAT – DEFINING THE GOAL

What exactly are **we** trying to achieve?

Purpose: Clearly articulate the goal or outcome.

Strategies:
- Define what success will look like!
- Use SMART format (Specific, Measurable, Achievable, Relevant, Time-bound).
- Focus on the impact the vision will have on the team or organization.
- Keep the goal concise—one sentence or phrase.
  - The longer it takes you to explain, the less prepared you are to discuss.

Tip: Imagine explaining the goal to someone outside the team. Would they understand it?

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HOW – OUTLINE THE APPROACH

How will we achieve this goal?

Purpose: Describe or provide visuals for the path forward.

Strategies:
- Outline key steps or milestones towards the final goal.
- Leverage your team's strengths and resources.
- Break the goal into manageable tasks to ensure focus, accountability, and momentum.

Tip: Consider what resources, tools, or processes might be needed to ensure success.

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WHO – IDENTIFY, CLARIFY ROLES

Who is involved in the success of this goal?

Purpose: Clarify who needs to be part of the process and their roles.

Strategies:
- Identify the tasks needed to be completed and key stakeholders in the process: team players, leadership, external collaborators.
- Clarify the tasks/roles to avoid gaps and overlap.

Tip: Consider how to involve and inspire each group.

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WHEN – SET MILESTONES AND DEADLINES

When will we reach our goal?

Purpose: Establish a realistic timeline with checkpoints.

Strategies:
- Create and communicate a project timeline.
- Set short-term wins – and celebrate them to build momentum.
- Include regular check-ins to reassess or adjust when needed.

Tip: Utilize collaborative tools to track deadlines and be ready to hold people accountable through effective feedback conversations.

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WHY – CONNECT TO A PURPOSE

Why does this matter?

Purpose: Motivate the team by connecting the vision to a larger purpose and/or explaining the need for the change.

Strategies:
- Highlight how the goal aligns with organizational/professional values.
- Share the positive impact that will result from the goal.
- Explain the steps involved in the creation/identification of the goal.

Tip: Humans connect to stories and emotions – what inspires your team?

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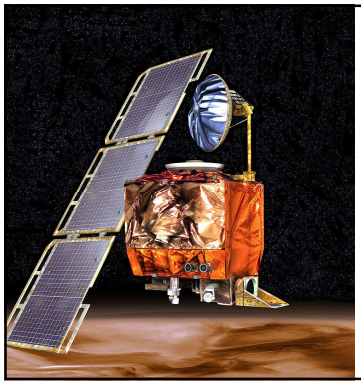

$125 Million Lesson

1999 Mars Climate Orbiter

Jet Propulsion Lab = meter/millimeter

Spacecraft Builders = feet/inches

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Aligning Goals

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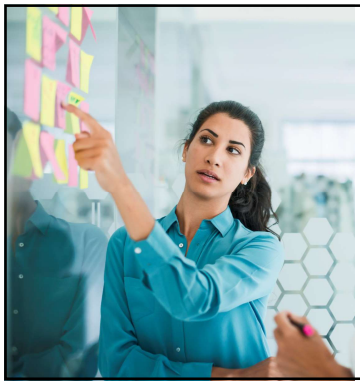

Goal Alignment

- Avoids gaps and overlaps
- Creates a unified purpose
- Builds accountability and transparency

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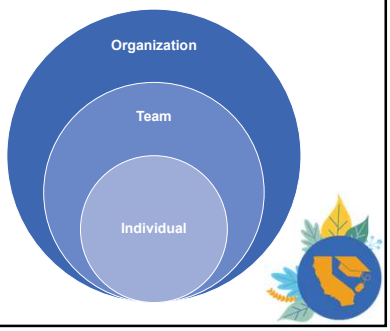
SHARED VISION

Does everyone understand the broader organizational or project goal?

Everyone is mission-critical for a successful outcome.



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SHARED VISION

Organization Goals:
High-level objectives and initiatives.

Team Goals:
How the department/team supports the organizational goal.

Individual:
How each person's work contributes to the team goal.

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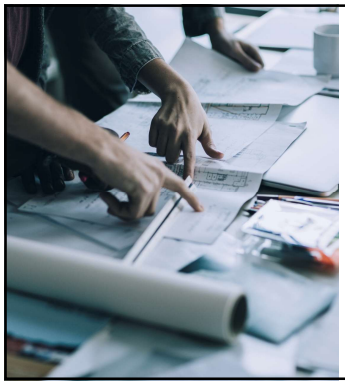

Aligning Goals

1. Define the big picture.
2. Break into team-specific objectives.
3. Map individual contributions to team goal.
4. Regularly communicate progress and updates.
5. Reassess and realign goals when necessary.

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TOOLS AND TECHNOLOGY

Goal-Setting Frameworks:

SMART goals, S.W.O.T. analysis, KPIs, Grant-specific requirements, etc.

Collaboration Tools:

Asana, Trello, Microsoft Teams, Slack

Check-ins and Updates:

Weekly team huddles, cross-functional check-ins

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ALIGNMENT CHALLENGES

CHALLENGE	SOLUTION
Miscommunication between teams	Create a shared document or dashboard
Competing priorities	Use regular meetings to clarify and renegotiate priorities
Lack of ownership	Assign clear responsibilities and tasks
Missed deadlines	Conduct effective feedback conversations/create a team charter

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Building Trust & Commitment

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Trusted Leader

Think about a leader you trust or trusted deeply.

Why did you trust them?

What specific behaviors or actions built that trust?

How did their trustworthiness impact your commitment to the team or organization?

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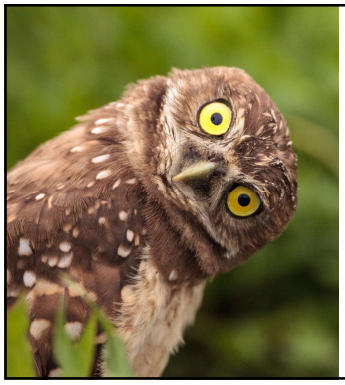

Untrusted Leader

What are the characteristics/behaviors of a leader that teams will not trust?

How does that impact their commitment?

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TRUST IN LEADERSHIP

Competence: Demonstrating the skills and knowledge to deliver results.

Consistency: Acting in alignment with values and commitments – consistently.

Empathy: Understanding and caring about the needs and perspectives of others.

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Commitment is a byproduct of trust.

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How do you want to show up this year?

What will you change?

What will you grow/develop?

What will you discontinue?

What happens if you do?

What happens if you don't?

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Breaking Down Barriers

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TYPES OF BARRIERS

Structural Barriers: Silos, unclear roles, disorganized.

- Map out the current process to streamline or clarify roles.
- Use tools and technology to create shared dashboards (Project Management).
- Schedule regular cross-functional meetings with clear agendas.

Interpersonal Barriers: Miscommunication, team conflicts, etc.

- Develop/foster open communication through huddles or feedback loops.
- Facilitate effective feedback or performance management conversations.
- Provide skill-building opportunities in areas such as conflict resolution, communication styles, strengths-based teams, etc.

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TYPES OF BARRIERS

Cultural Barriers: Differences in work styles, values, or expectations.

- Embrace diversity by celebrating different perspectives.
- Develop and communicate shared expectations.
- Establish shared norms and values through team-building activities.

Behavioral Barriers: Resistance to change, low engagement.

- Strengths-based coaching or feedback.
- Deliver effective feedback or performance management conversations.

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Tools and Resources

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CALTRIN FREE RESOURCES

Upcoming Trainings | Training Archive | Self-Paced Courses

- Strengths-Based Leadership (March 2025)
- Eight-month Emerging Leaders Development Program (Summer 2025)
- Effective Feedback (Training Archive)
- Building Through Togetherness, Not Tasks & To-Do's (Training Archive)
- Leading Through Change (Self-Paced Course)

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DIRECTION, ALIGNMENT, COMMITMENT

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DIRECTION, ALIGNMENT, COMMITMENT

DIRECTION	
We agree on what we should be aiming to accomplish together.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
We have a clear vision of what the group needs to achieve in the future.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
We have group goals that guide our key decisions.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
Our work is united by a common direction.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
TOTAL	
ALIGNMENT	
Our work is aligned across the group.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
Although individuals take on different tasks in the group, our combined work fits together.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
People who perform different roles or functions in the group coordinate their work effectively.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
The work of each individual is well coordinated with the work of others.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
TOTAL	
COMMITMENT	
People in the group are committed to the group.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
People give the effort needed for the group to succeed.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
People are dedicated to this group even when we face setbacks.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○
We trust one another to accomplish the work of the group.	1 ○ 2 ○ 3 ○ 4 ○ 5 ○

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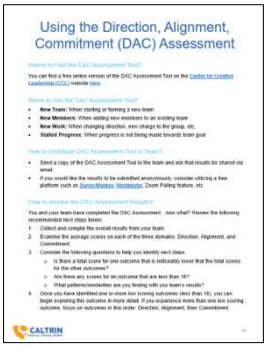
Using the Direction, Alignment, Commitment (DAC) Assessment

Where to Find the DAC Assessment Tool?

You can find a free online version of the DAC Assessment Tool on the Center for Creative Leadership (CCL)'s website here.

When to Use the DAC Assessment Tool?

- **New Team:** When starting or forming a new team
- **New Members:** When adding new members to an existing team
- **New Work:** When changing direction, new charge to the group, etc.
- **Stalled Progress:** When progress is not being made towards team goal

How to Distribute DAC Assessment Tool to Team?

- Send a copy of the DAC Assessment Tool to the team and ask that results be shared via email
- If you would like the results to be submitted anonymously, consider utilizing a free platform such as SurveyMonkey, Mentimeter, Zoom Polling feature, etc.

How to Review the DAC Assessment Results?

You and your team have completed the DAC Assessment…now what? Review the following recommended next steps below:

1. Collect and compile the overall results from your team.
2. Examine the average scores on each of the three domains: Direction, Alignment, and Commitment.
3. Consider the following questions to help you identify next steps:
   - Is there a total score for one outcome that is noticeably lower that the total scores for the other outcomes?
   - Are there any scores for an outcome that are less than 16?
   - What patterns/similarities are you finding with you team's results?
4. Once you have identified one or more low scoring outcomes (less than 16), you can begin exploring this outcome in more detail. If you experience more than one low scoring outcome, focus on outcomes in this order: Direction, Alignment, then Commitment.

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Using the Direction, Alignment, Commitment (DAC) Assessment

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Thanks for joining us!

WHAT'S NEXT?

- Survey and certificate in the chat now
- Follow-up email with resources within two days
- Watch your inbox for the next issue of *CalTrin Connect*

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