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THE JEFFERSON CIRCLE

*A Strategic Venture
Applying Basic Values
to Renew Leaders and
Their Organizations*

David Trickett,
President
Bruce O. Boston,
Vice President

29 January 1993

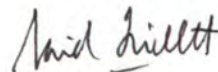
Mr. Eli Segal, Director
Office of National Service
Room 145, OEOB
1600 Pennsylvania Avenue, N.W.
Washington, D.C. 20500

Dear Mr. Segal,

Yesterday I spoke with Frances Hesselbein, a dear friend with whom I've come to do work in the context of her service with the Peter Drucker Foundation. After we finished, I had the strong sense that you would like to see the work I've recently begun, and which Frances, Peter Drucker, John Gardner, Dick Schubert (currently head of the Points of Light Foundation), and a growing number of business and nonprofit leaders alike think to be of critical importance. We are in the rollout phase of The Jefferson Circle; I have attached to this letter a sample packet of information regarding our mission and the tasks we accept in the pursuit of our mission. Basically, we seek to help reconnect the three sectors of society, contributing to the renewal of leaders, their organizations, and the wider social fabric. We focus primarily upon the private sector (given what I understand of your background, you will appreciate this fact), but help build bridges between it and the rest of our nation that seeks a renewal through and through.

If my own work can be of assistance to you and your colleagues--whether those around you in your current work or business and public leaders elsewhere--I would hope that I might hear from you. It would be a pleasure to meet. Hoping that I may hear from you, I am,

Sincerely,



David Trickett
President

Other Services We Offer:

- ★ creating strategies that build shared vision for teamwork between boards and senior executives
- ★ one-to-one counsel for executives seeking professional and personal renewal
- ★ peer forums for senior leaders focusing on cross-organizational challenges in a time of rapid change
- ★ public seminars and workshops on making transitions from survival through success to significance
- ★ periodic bulletins that illustrate practical ways of applying basic values to individual and organizational performance



THE JEFFERSON CIRCLE

OUR COMMITMENT is to help you get results, by inspiring and equipping leaders on whom, in the words of Thomas Jefferson, "public prosperity and individual happiness...depend...[and] to form them to habits of reflection and correct action, rendering them examples of virtue to others, and of happiness within themselves." (*Report of the Commissioners for the University of Virginia [1818]*)

"Who takes care of the Common Good? Who defines it? Who balances the separate and often competing goals and values of society's institutions?...The challenge that faces us now...is to make the pluralism of autonomous, knowledge-based organizations redound both to economic performance and to political and social cohesion."

Peter Drucker

The Post-Capitalist Society, 1993



PRINCIPALS

David Trickett, Ph.D., President, has held management positions in higher education, and has wide experience with the corporate world, the federal government, and non-profit organizations ranging from international to local. He is a skillful and strategic team builder in complex and intercultural settings. A teacher who provides counsel to leaders, he knows how to unlock the transformative power of basic values in order to enhance performance.

Bruce O. Boston, Ph.D., Vice-President, is a communicator, teacher, and creative problem-solver. He has broad experience in helping businesses, government agencies, and professional associations to discover new insights, images, and metaphors that enable them to break through impasses. He has always believed that in the search for answers, whether for persons or organizations, the most important thing to do is to find better questions.

THE JEFFERSON CIRCLE

A Strategic Venture
Applying Basic Values
to Renew Leaders
and Their Organizations

10708 Rosehaven Street, Fairfax, VA 22030
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BEYOND THE BOTTOM LINE: THE VALUE OF VALUES WHERE PEOPLE WORK

Basic Values and American Organizational Life

Thoughtful leaders in American organizational life know that it is crucial to nurture the culture or spirit of their organization. These leaders, who come from corporations, professional and trade associations, government, and the philanthropic sector, realize that people are most productive when their deeply held values fit closely the mission and operation of their organization.

Why Do We Sense a "Disconnect" in Life and Work?

Political, economic, social, and cultural forces contend for loyalty in our organizational and even national life. Individuals and groups are driven further and further from shared vision sustained by common values, from rootedness in a common ground, and from commitment to the common good.

At all levels of the workforce, people are asking hard questions, such as:

- ★ How do I fit into a larger picture that makes sense in terms of basic values? What kind of moral universe am I helping to construct by my decisions, my relationships, and my goals?
- ★ What assumptions and principles am I endorsing by the decisions I make?
- ★ What values drive my organization? How can I help direct them toward a future I believe in and want to work for?

Their answers often create feelings of helplessness and isolation. The Jefferson Circle can help your organization break through this cycle.

HOW THE JEFFERSON CIRCLE CAN HELP

The Jefferson Circle helps reconnect people and organizations with values and principles that foster a more productive and caring environment in the workplace and wider society.

The mission of the Jefferson Circle is to give counsel to individuals and leadership teams within organizations in the critical task of *discernment* and its practical implications. We facilitate a process of continuous learning that helps leaders explore, map, and apply shared values for personal and organizational renewal.

What We Offer

Our product is a process that improves the performance of individuals and organizations. We help you to reconnect ends and means for enhanced effectiveness and the development of new competencies, and do so by providing a range of services:

- ★ surveys, interviews, and exercises to identify basic values and principles needed to manage your organization's mission
- ★ mentoring for CEOs and senior leadership teams experiencing personal and organizational transitions
- ★ executive seminars teaching how to build the trust and implement leadership strategies that will renew your organization's culture
- ★ dialogues to bring your most senior managers and board members into a creative new partnership

HOW WE DELIVER OUR SERVICES TO YOUR ORGANIZATION

Our core services are divided into three phases, which are designed to build on one another. Each is individually tailored for the client.

Phase One: Values Audit of the Organization and Analysis Report

We administer an anonymous Values Audit to targeted key leaders in order to determine the core values that actually govern their perspectives, behaviors, beliefs, and decisions. We fashion the vital information gathered from the Values Audit into a Values Portrait of the organization and compare existing mission statements with the perceptions of top management. We note congruencies and discrepancies and make recommendations for renewal.

Phase Two: Seminar for Managers

We provide an executive seminar that integrates the Values Audit and Analysis into the workplan of targeted leadership teams. Using an interactive method of learning that draws upon the distinctive contributions of the diverse backgrounds of these managers, we help participants understand how their personal values and commitments can be most effective in addressing their organization's strategic challenges. This workshop can be focused according to your specific need.

Phase Three: Strategic Design for Organizational Change

We work with leadership teams to design a distinctive, values-based strategic plan that can renew their organization by reconnecting people and basic values with the organization's central mission.

OUR VISION

The Jefferson Circle is a new venture giving a sharp focus to a cluster of issues affecting us all, among them change, diversity, and excellence. We have formed a small learning and teaching network of highly talented people, a distinctive feature of it being our shared conviction that this nation has a pressing need to pull its fragmented parts together in a new and powerful way. We believe that the key to this task is to work with leaders and organizations, helping them deal with very practical dimensions of values, vision, mission, leadership, and the effectiveness of their organizations. John Gardner, who has provided insight to us along the way, speaks of the need for "rebirth" in this country, and we have indeed found a yearning for inspiration and hope among people in all corners of this land--a desire that cuts across ethnic group, age, gender, economic status, profession, and even the deeply held beliefs that tend to splinter society into ideological camps. Peter Drucker, also a guide to us at a number of critical points, has long spoken about something we've discerned: people want to be part of something of enduring significance, to contribute value to a cause, a mission, that goes beyond--but fits with--their daily tasks.

It is our vision to help reconnect people's desire to contribute to something of lasting value, to count for something, with their competencies and related interest in learning and growing in their work. We have chosen to focus our efforts primarily on the private sector, for it is simply the case that the business world is the engine which gives sustained energy to economies. Our mission takes on even more urgency in light of the global shift to knowledge-based economies, where ideas take on a new critical value. An important part of our task is to take down barriers that inhibit the creation of shared vision and prevent the formation of powerful alliances within divisions of organizations, and to build bridges between organizations; we firmly believe that we all stand to benefit greatly by being part of a new ecology of organizations. We think that values and vision lie at the heart of this effort, and that an environment of trust and shared responsibility with practical incentives to gain and keep loyalty are crucial to organizational effectiveness. Members of our team have been looking at these matters in a variety of settings for some twenty years; we have formed The Jefferson Circle in order to concentrate our energy and focus our work.

Our mission is to tap the reservoir of basic values and channel the desire to make a difference that can be found somewhere in all organizational cultures, in order to shape a shared vision that encourages the renewal of leaders and their organizations. Some of our other documents explain in greater detail just how we carry out this mission, but here's the heart of it: we help leaders and others in their organizations see how values form the ideas that build effective strategies. We help grow learning networks of committed workers, the core of highly productive organizations. In the work of The Jefferson Circle, ideas mean business!

THE JEFFERSON CIRCLE

Welcome to the Jefferson Circle!

Our Mission: We are a small group whose mission is to help leaders and leadership teams achieve excellence by addressing the importance of *values* within organizations. We work with individuals and organizations to identify the values that shape, sustain, and transform organizational life. Whether working with individuals or teams, we seek new ways to connect the organization itself with the larger environment in which it carries out its work.

What makes us different? Unlike many others responding to a renewed interest in values, both in and beyond the workplace, we focus on those points where individuals, organizations, and society intersect. We attend to the spirit as well as the stories of organizations in order to grow a shared vision and provide a *sustainable* model for renewal. At the heart of our approach lies the insight of Peter Drucker: "The challenge that faces us now...is to make the pluralism of autonomous, knowledge-based organizations redound both to economic performance and to political and social cohesion."

We help establish Learning Networks within an organization, in order to build upon the values of its people to help ensure their commitment to its mission. These Learning Networks are interdependent teams of peers who engage one another in process of learning for practical outcomes that will continue after our work with the organization is completed. They serve several functions that help to sustain the process of renewal that we facilitate: They encourage innovation and the discernment of latent capacities within the organization that can be developed to achieve both short- and long-term goals. They help identify rewards and incentives that will encourage everyone to perform their best. They provide opportunities for transformative learning that is increasingly necessary in a time of rapid change. In all, Learning Networks help develop people's greatest strengths and consequently make the most of the human resources within the organization.

About our name....We believe that a central aspect of renewal today is the recovery of wisdom from the past. In his own time, Thomas Jefferson embodied the vital connection between theory and practice. He had an insatiable curiosity, fed by cross-disciplinary and cross-functional thinking. He had a burning commitment to learning as essential to human freedom and attainment, and he saw the need for those in commerce, public service, and voluntary work to join their efforts for the good of all. A circle highlights the essential interdependence both of individuals within organizations and of organizations with one another in society. A circle, moreover, represents a model of leadership and management that characterizes the most highly effective organization.

The enclosed brochure and additional information explain the services we offer. We are always happy to discuss these further and would welcome the opportunity to speak with you about how we might be able to help unleash the potential in your organization.

DAVID GEORGE TRICKETT

David Trickett was elected in the spring of 1988 to serve as Executive Director of the Washington Theological Consortium, a strategic alliance of ten graduate schools in the mid-Atlantic region; his tenure began that July. Prior to that time, he had worked in the private and public sectors, where on the one hand he shared responsibility for ensuring staff responsiveness to customer needs for a major retailer and on the other accepted increasingly challenging assignments as a federal law enforcement officer. More recently, he has worked with educational and religious institutions, as a leader in the United Methodist Church and as a member of the teaching faculties and administrative leadership teams of both Southern Methodist and Tulane universities.

A native of Shreveport, Louisiana, Mr. Trickett attended Emory University, Louisiana State University (Baton Rouge), Southern Methodist University, and on travelling postgraduate fellowships conducted research at Harvard and Oxford universities. With an honors undergraduate degree in the history of institutions and ideas, he earned honors graduate degrees in ethics and religious studies, focussing upon values and their function in organizations. He has earned a Ph.D. from Southern Methodist University, and has participated in the strategic management component of the Columbia Business School's Executive Program. Mr. Trickett has been named or elected to a number of honorary organizations, and is listed in a current edition of Who's Who. Mr. Trickett is married and has three children.

Mr. Trickett has developed a cluster of distinctive competencies addressing the arts of leadership and communication for organizational effectiveness. Building upon his experience and research in a variety of settings across all three social sectors, he deals with management of organizational change in the context of dynamic and often competing core values; the importance of cross-functional thinking and performance; the role of strategic team-building in enhancing an organization's potency; the fundamental significance of articulating a clear vision in the process of identifying and implementing a mission; the need to renew and strengthen relationships between chief executives and boards of directors or trustees (especially as outside directors begin to exercise a more active role than they did previously); the place of deeply held values in the formation of personal and professional identity, and the use of assessment tools as a means to help achieve creative alignment between persons and their organizational tasks; the need to move an organization from a techniques-oriented quest for excellence and quality to an enduring commitment to a continuous improvement and learning process (which entails a shift from learning to teaching models of organizational life); and the role of shared vision in building wide stakeholder trust and commitment.

Having served on and worked with boards of organizations at the international, national, regional, and local levels, Mr. Trickett has also been a volunteer in many ventures. These include his election as vice chair of the Virginia delegation to the 1991 White House Conference on Libraries and Information Services; his appointment to the Virginia Library

and Information Services Taskforce (with a mandate to set up a statewide strategy for information transfer to enhance workplace productivity and provide suggestions that can give residents innovative ways to access public information); his role as a founding director of the Computer Ethics Institute (chartered in 1992), a joint venture with officers of the IBM Corporation and the Brookings Institution; his work with a citizens' leadership team for a (successful!) \$169+ million bond issue to benefit public education; his service as an adviser to selected projects related to the Ethical, Legal, and Social Implications Program of the National Center for Human Genome Research at the National Institutes of Health; and his work with a regional affiliate of the National Endowment for the Humanities.

Recently, Mr. Trickett agreed to serve as an adviser to organizations in the volunteer sector by assisting the National Center for Nonprofit Boards. He spends time with boards and executive staff looking at matters such as organizational vision, mission, strategy, governance, board-executive relations, the management of diversity, and organizational assessment. In addition, he has begun to act as a contributing volunteer for targeted projects with the Peter F. Drucker Foundation for Nonprofit Management. Convinced of the need to transfer selected insights gleaned from nonprofit management and governance to the business world, he has begun a relationship with staff and members of the Board of Overseers of the Malcolm Baldrige National Quality Award program, looking at the interlocking issues of ethics, leadership, professional standards and the training of examiners, and the wide range of human resources challenges that arise for private enterprise as new attention is given to "total quality management" (and its approaching successor, "zero defects management").

With his extensive speaking and seminar experience, as an author of dozens of reviews, articles, and other works since 1976, and in response to increasing requests for his help, Mr. Trickett has taken steps to organize a small group of highly competent experts committed to working with organizations in the private, public, and nonprofit sectors. Called the Jefferson Circle, this group's mission is to assist people in realizing the extraordinary untapped potential lying within the depths and breadth of human experience, and to take practical steps toward its potent deployment. By connecting the most deeply held core values people have with the organizational challenges and opportunities they face daily (seen within the context of larger systems and with a future-outcome orientation), the Jefferson Circle aims to help equip new generations of strategically inspired and competent leaders. The range of those Mr. Trickett has already served includes senior corporate executives in both the manufacturing and service spheres of the private sector; elected and appointed public leaders in this country and eastern Europe; leaders in the United States military services (in both domestic and overseas installations); leaders in the arena of organized philanthropy (including families of significant wealth and some of their advisers); health care organizations; trade and professional associations; institutions of higher education; library systems; and national and regional coalitions attempting to meet acute human social needs.

Mr. Trickett may be contacted at: 10708 Rosehaven Street, Fairfax, Virginia 22030
Telephone: (703) 385-5971 Fax: (703) 385-7688

OTHER SERVICES

Executive Learning Networks--circles in various metropolitan areas

Publications

Transition Counsel

Annual Meeting

STRATEGIC DESIGN FOR ORGANIZATIONAL CHANGE

Many strategic plans are little more than wish-lists. Every senior manager's dream for the next five years may be included, but the plan is doomed to failure because no one really knows how to get from here to there, or what kinds of organizational energy will do the job.

At The Jefferson Circle, we see things differently. We believe that an environment of trust, shared responsibility, and transformative learning is essential for successful planning. Unless vision is yoked to the deeply held values of *all* relevant stakeholders, genuine organizational renewal is impossible.

Working with targeted leadership teams, The Jefferson Circle guides you through a distinctive, values-sensitive process that capitalizes on the rich human resources in your organization. At various stages of the task, we use focus groups and other on-site methods to gather information. This aspect of the process serves to identify and elicit untapped potential from within the organization. We help you build cross-functional and cross-organizational bridges to reconnect parts into a unified whole. At this point, we work with your leadership team to develop a *sustainable* strategic plan that emphasizes a variety of incentives to ensure that all stakeholders are committed to its success. We provide you with the tools to move from good intentions to results!

When our work with you is completed, the strategic plan is linked to a dynamic vision, reflects a realistic mission, and is empowered by the shared values of all who have contributed to it. A significant outcome is the formation (or the re-formation) of a learning network within your organization. This network consists of people beyond any standing strategic planning committee; it is a series of circles of accountability and learning whereby the basic values and vision of your people are continually channelled into your structures of strategic management.

EXECUTIVE SEMINARS

Each senior management team has its own workplan. But does it function as an effective, harmonious part of the larger organization, or is it somehow out-of-sync? Our Executive Seminars, which are tailored to fit your group's specific needs, help your managers learn to perform better by identifying, and then building on, the basic values that shape their vision of themselves, their work, and their organization. We help address several factors critical to an organization's success, among them three of the most important: change, diversity, and excellence. Our seminars range in length from one-half day to two-and-a-half days.

Using the give and take of guided dialogue, we employ case studies (some especially created for our seminars), texts containing one or more of the "great ideas" that have historically shaped individuals and organizations over time, discussion focused on the life and achievements of selected widely regarded leaders, or experiments in which participants build different scenarios in order to create realistic management models that can actually be adopted. All participants in the Executive Seminars benefit in several ways, perhaps most importantly by focusing the lens of basic values through which they see the world, and connecting what they see with their daily responsibilities.

The Executive Seminars equip leaders to function decisively and thoughtfully amid the significant change that affects organizations today. To discern relevance in the profusion of detail is one of the most sought-after capabilities of a manager-leader. Our Executive Seminars provide the occasion for that discernment to grow. You provide a circle of peer leaders who will work together as a team to exercise that discernment.

Some topics of The Jefferson Circle's Executive Seminars include:

- **Change: Charting a Course and Steering the Vessel**
- **Great Ideas: What Our Future Can Learn from the Past**
- **In Transition: From Survival Through Success to Significance**
- **Diversity: How Basic Values Create New Options**
- **Quality and Excellence: The Human Key**
- **Managing for the Mission: Values and Vision at the Heart**

THE VALUES AUDIT

WHAT IS A VALUES AUDIT?

HOW DOES IT WORK?

WHAT DOES IT DO FOR YOUR ORGANIZATION?

What is a Values Audit? The word *audit* often calls to mind either the Internal Revenue Service or the process most organizations go through every year to find out where they are financially. Although a values audit is designed to take an organization's pulse, it looks at issues of a very different kind from the ones that turn up on the bottom line--the kind that are actually more important, in the long run. It assesses the spirit, or culture, of the organization by looking at the values that connect people with their work.

Increasing attention being given to ethics in organizations, while important, cannot fully address the role of values in groups, for values are not just principles or merely abstractions. They are the wellsprings of our understanding, our decisions, and our actions; consequently, they are at the core of our relationships with others. On a day-to-day basis, it is *values* that ground our commitment to the tasks we undertake.

A values audit, then, is two things:

- It is a *process* that helps organizations and their leaders understand the key values that shape perceptions, attitudes, behaviors, decisions, and goal-setting in the organization; and
- It is the *instrument(s)*, tools such as focused story-telling and our own questionnaires, used to gather the information needed to paint a values portrait of the organization.

How does a Jefferson Circle Values Audit Work? A Jefferson Circle values audit uses anonymous questionnaires, interviews (group and one-to-one), organizational lore and stories (from both written and oral sources), and group discussions. We work with leaders and others in the organization to determine the basic values that drive the organization. We analyze our findings and compile them into a written report. On the next page, you will find some sample questions of the type we ask.

What Does a Values Audit Do for Your Organization? Organizations benefit from a values audit in three ways:

- First, it provides an organization's leaders with a clear picture of the most powerful forces inside people's minds and hearts as they do their work. It enables them to see the relative "fit" between the organization's stated mission and the basic values of the people who carry it out.
- Second, it tells a good deal about the organization's health. A workplace where people are unable to live out their most deeply held values, or are frustrated in the attempt, cannot remain vital and highly productive.
- Third, the written audit report includes concrete suggestions to help the organization align people with mission and thereby improve its health.