

2013

Lean In Discussion Circle # 1
With Facilitation Guide



Lean In Discussion Circle #1

Introduction

The book, *Lean In* by Sheryl Sandberg has generated important and relevant discussion and dialogue around the state of women in corporate America. Whether you agree or disagree with the concepts addressed in Sandberg's book, in many ways, it is a conversation that has continued to evolve as women evolve in the workplace.

TIAA-CREF plans to join the conversation by launching *Lean In* discussion circles, small groups led by EMT members to share differing viewpoints on the concepts put forth in the book, *Lean In*, thereby creating relevant discussion in support of diversity & inclusion overall at TIAA-CREF and women in the workplace more specifically.

What is a Discussion Circle?

Discussion circles are facilitated conversations comprised of small groups of approximately 12 - 15 women. The conversations, led by women EMT members are designed to facilitate dialogue and encourage shared learning between women professionals at all levels. Through discussion circles, participants will share differing viewpoints and encourage and support each other in an atmosphere of confidentiality and trust. During this pilot phase, our target audience will consist of members of our Women's Employee Resource Group and will be led by women EMT members. Our future plans will include broadening both the target audience of women and the facilitator audience to include male EMT members.

Who is it designed for?

This is designed for members of the Women's ERG who were preselected for the program as a reward for excellent performance. In addition, about half the participants were selected through a lottery system.

Exercise Objectives:

- To foster an inclusive environment by creating and encouraging an open exchange of ideas and information among women at TIAA-CREF
- To strengthen the strategic relationships of women across TIAA-CREF and between senior and junior women
- To build a community where women at TIAA-CREF can find viable solutions for defining their vision of success and plotting a path to get there

Discussion Circle 1 – Meeting Agenda:

PART 1 - INTRODUCTIONS & OUTLINE OF GOALS

- Learn more about Lean In and Discussion Circles
- Get to know each other better – Circle introductions

PART 2 - GETTING TO *LEAN IN* – *SHARE YOUR LEAN IN STORY*

- Share your Lean In Stories

Sharing personal stories is an important part of Lean In. Good stories can inspire, teach and connect us. To get to know each other, plan to share a short Lean In Story during your Kickoff Meeting

PART 3 - GETTING TO *LEAN IN* – *PERSONAL GOAL SETTING*

- Introduce the concept of accountability pairs
- Establish accountability pairs
- Individual action commitment - pair work with accountability partner

PART 4 – REFLECTION/FOLLOW UP & MEETING CLOSE

- Participants will reflect on a key learning/actionable takeaway
- Share framework for follow up (check in calls & webcasts to be led by D&I and the local ERG)
- Discuss next steps

Facilitator Guidelines:

<u>Pre-Activity</u>	<u>EMT Facilitator Instruction</u>	<u>Talking Points</u>
<p>Pre- Work sent to be sent to Participants:</p> <ol style="list-style-type: none"> 1.) Lean In Book 2.) Lean In Videos 3.) Lean In Story Questions 	<p>To be best prepared for the meeting, become familiar with the Lean In videos (Sandberg’s TED Talk, B. Mortiz interview) and the enclosed meeting outline.</p>	
<p><u>Circle Facilitation</u></p> <p>Group Welcome</p> <p>3-5 minutes</p>	<p>Welcome all group members, explain why they are there and the purpose of the discussion circles.</p>	<p>Welcome to our Lean In discussion circle. This meeting is about getting to know each other and provides an opportunity for each of you to learn from one another about yourselves, your careers and each other. It is also what I believe is the beginning of a strengthened community of women across TIAA-CREF.</p> <p>The conversations that are taking place across our major markets (NY, Charlotte, Denver and Boston) are designed to facilitate dialogue and encourage shared learning between women professionals at all levels. Through our discussion circle, you have an opportunity share differing viewpoints and encourage and support each other in an atmosphere of confidentiality and trust.</p> <p><u>TIAA-CREF started Lean In Circles to:</u></p> <ul style="list-style-type: none"> • Foster an inclusive environment by creating and encouraging an open exchange of ideas and information among women at TIAA-CREF • Strengthen the strategic relationships of women across TIAA-CREF and between senior and junior women • To build a community where women at TIAA-CREF can find viable solutions for defining their vision of success and plotting a path to get there <p>Our goal is that these initial circle meetings serve as a pilot for a program that we hope to expand. During this pilot phase, our target audience consists of members of our Women’s Employee Resource Group and will be led by women EMT members. Our future plans will include broadening both the target audience of women and the facilitator audience to include male EMT members.</p>

<p>Getting to Know Each Other / Member Introductions</p> <p>20 minutes</p>	<p>Ask each member to take 1- 3 minutes to share her name, title, fun fact about herself and what she would like to gain from the discussion circles.</p> <p>Introduce yourself first and explain your role as EMT circle moderator and what you personally want to gain from the experience as well as your vision for the conversation.</p>	
<p>Introduce the Concept of Leaning In and ask participants to share a story of their own.</p>		<p>Sharing personal stories is an important part of Lean In. Good stories can inspire, teach and connect us.</p> <p>A Lean In Story captures a moment in your career or life when you chose to “lean in” or “lean back.” When you lean in, you push through a challenge and go down a path with an uncertain outcome you believe in yourself and take a risk. When you lean back, you choose to stay in a known or comfortable situation you play it safe.</p> <p>We all lean in and lean back at different times, and can learn from both types of stories.</p>
<p>Have each member share a <i>Lean In Story</i></p> <p>25 minutes</p>	<p>Ask: <i>Describe a moment you could choose to lean in or lean back. What was the situation and how did you react?</i></p> <p>Group will have been provided with Lean In worksheet and should be prepared to share.</p>	<p>Sample Questions to Prompt Discussion:</p> <ul style="list-style-type: none"> • Describe a moment you chose to lean in or lean back. What was the situation? <ul style="list-style-type: none"> ○ I’ll never forget when • Explain the decision you made — and why you made it. <ul style="list-style-type: none"> ○ I decided to lean in (lean back) because • Describe what action you took and how the situation played out. <ul style="list-style-type: none"> ○ I (action) and here’s what happened • Explain how the experience affected you personally and professionally. How did your life change? <ul style="list-style-type: none"> ○ After leaning in (leaning back)

<p>Debrief Exercise</p> <p>5 minutes</p>	<p>Invite each group to respond to what members have shared.</p>	<p>Sample Questions to Prompt Discussion:</p> <ul style="list-style-type: none"> • Are there some common themes that have emerged from our Lean In Stories? • What happened when you chose to lean in? • Are there some common roadblocks that were present when you chose to lean back? • What are some things we can do as individuals and as a group of supporters to change our lean back stories to lean in stories?
<p>Break</p> <p>5 minutes</p>		
<p>Introduce the Concept of Accountability Pairs</p> <p>4 minutes</p>	<p>Ask members to self-select an accountability partner.</p> <p>Explain the process of pair assignment / partner selection.</p> <p>Explain the purpose of accountability pairs.</p> <p>Allow members to ask questions.</p>	<p>In your accountability pairs, you will act as both the coach and the coachee. The result is a more collaborative, supportive approach to setting an intention and action for yourself..</p> <p>Your accountability partner will connect with you after this discussion and provides:</p> <ul style="list-style-type: none"> • a thinking partner • objective, trusted support • accountability to goals and actions • a forum for idea exchange
<p>Establish Accountability Partners / Individual Goal Setting Exercise</p> <p>15 minutes</p>	<p>Have members get into their pairs.</p> <p>Once in pairs, have members identify one key action they will take after the circle discussion.</p>	<p>Take about 5 minutes to discuss your action with your partner. Share your dreams, your reservations, what inspires you and what might be holding you back. Partners should be prepared to ask probing questions to uncover dreams and fears and provide insight where needed.</p> <p>After 5 minutes switch roles. (Give 1-minute warning)</p> <p>Based on your conversation take 5 minutes to fill out your action worksheet.</p> <p>Agree on a report out date with your partner where you will share progress on your action items. This should be in two to four weeks.</p>

<p>Discussion Circle Debrief</p> <p>25 minutes</p>	<p>Use this debrief exercise as a way to synthesize the discussion outcomes and to inform the Action Planning Exercise.</p>	<p>Sample Questions to Prompt Discussion:</p> <ul style="list-style-type: none"> • What have you learned as a result of this Discussion Circle? • What traits / behaviors do you recognize in yourself that you admire? • What traits / behaviors do you recognize in other circle members that you admire? • What behaviors do you recognize in yourself that you would like to change? • What are some positive things that have emerged regarding the TIAA-CREF culture? • What are some things you'd like to see change? • What are some things you will do differently as a result of this discussion Circle?
<p>Discussion Circle Wrap Up</p> <p>5 minutes</p>	<p>Share plans for follow up and next steps.</p>	<p>I want to personally thank you for your engagement today. In addition to a follow up assessment you will receive from the D&I office within the next few days, you should plan to individually connect with your accountability partner. Also know that over the next four weeks, another cycle of these circles will take place with other WERG members. One of our immediate goals is to keep this community connected. Our D&I office, in partnership with your local ERG leaders will be checking in with you via check in calls and also providing you with a series of webcasts, one per month until year-end. Our goal, as the women on the EMT is to provide the male members of our EMT (who are also engaged and interested in this topic) with full debrief on the success of this pilot phase with the intention of growing the initiative and you will hear more about our plans to continue the formal circle discussions by year end.</p>

Action Setting Exercise

Accountability Partner: _____

Report Out: _____

Personal Action or Commitment:	
Why action is important to me:	Next Steps:
Support needed to complete action:	

Potential Roadblocks or Obstacles	Steps to overcome them