

## **MEETING THE CHALLENGE FOR COLLABORATIVE EXCELLENCE: AFTER-WORD**

*By Beata C. Lewis, Bridging Lives and Margie Tatro, Sandia National Laboratories\*  
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Early in 2001, Sandia National Laboratories President Paul Robinson articulated a primary challenge to all employees: “to accelerate the speed at which we innovate in a collaborative environment characterized by increasing complexity and rapid change.” The Energy and Transportation Security Center responded to this call for faster, more responsive and more collaborative innovation, in part, by taking a close, collective look at how they collaborate.

Margie Tatro, Director of the Energy and Transportation Security Center, invited her leadership team to participate in a two-day program, Meeting the Challenge, designed and led by Beata C. Lewis, founder of Bridging Lives. Meeting the Challenge provided a venue for both leadership development and needs assessment for cultivating high-performance collaboration.

Meeting the Challenge was designed from the premise that trust and relationships are the key critical variables for increasing levels and speed of innovation. This grants that each individual contributor in the workgroup already performs at high levels of excellence. The program focuses on relational dynamics to optimize the value and impact of collaborative efforts. This was an exceptional opportunity for the Center leadership team to understand and explore:

- Who they are as a team —insights, skills, intentions and resources each person contributes as a participant and leader in team endeavors.
- How they collaborate —how they structure and cultivate the relationships essential for collective innovation, productivity and satisfaction.
- How trust and betrayal dynamics impact their ability to accomplish desired results.
- Ways to attend to relationship building from a foundation of trust, especially when breakdowns occur, for the sake of purposeful and coherent forward action.
- What behaviors each leader chooses to model and request within their areas of influence and activity.

The Center leadership team experienced considerable value from being explicit about how they choose to collaborate. They now share the foundation for a common language and understanding for addressing ongoing needs and interactions. They identified and are implementing specific action items. The team has greater clarity about the consequences of specific choices. By investing conscious attention to collaborative needs, they can better help each other reinforce and get support for the relationships that promote what they all want: growth and success.

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**COACHING FOR LEADERSHIP AND COLLABORATIVE EXCELLENCE**

Beata C. Lewis, JD, MSC, Executive Coach & Change Consultant

P.O. Box 3146, Sausalito, California 94966 T: 415 332 8338 E: Beata@BridgingLives.com W: www.BridgingLives.com

## **PROGRAM PURPOSE AND STRUCTURE**

The “Meeting the Challenge” program focuses on the role of trust in building and sustaining effective collaborative relationships. Its purpose is to increase awareness and assess needs for developing the group’s capacity to collaborate with greater ease and satisfaction. Toward this end, the central focus is on building the capacity to trust (not training for trustworthy behaviors). Participants begin to explore ways to incorporate greater levels of trust in the way they rely upon coworkers. They inquire about the value and possibility of building trust in sustainable, long-term, durable ways. They also sharpen their awareness of the foreseeable, and often painfully durable, costs from striving for collective goals and performance where trust is lacking. The program is intended as a portal for making explicit, informed and purposeful choices in how the group collaborates and to what end. For additional details on the program purpose and structure, see the Bridging Lives website: [www.BridgingLives.com](http://www.BridgingLives.com) or contact Beata directly at 415-332-8338.

## **PREPARATION FOR AND REFLECTIONS ABOUT THE EXPERIENCE**

Margie and Beata customized the program together to meet the specific needs for the Energy and Transportation Security Center’s leadership team. Together they articulated the purpose of bringing the program in at that time and who needed to participate. They aimed for 100% participation by the Center leadership team. Eleven of thirteen team members participated. Before closing on the second day, the group agreed on a process for integrating those who had been absent so that the group could move forward from a common basis of understanding, if not experience.

In preparation for the program, Margie had individual conversations with each member of the leadership team and found that most welcomed a facilitated conversation about collaboration and trust dynamics and could anticipate its value. There were several, however, who chose to participate but remained skeptical whether focusing on trust dynamics was a valid focus or would really help; they expressed wariness of the jargon and a desire to devote attention to what they perceived to be more pressing issues. As the leadership team began to review and inquire about specific data from a pre-program trust survey, supporters and skeptics alike were united in their enthusiasm to understand what was going on and how it affected their ability to move effectively on other pressing issues.

In planning but also during the program itself, Margie and Beata maintained open communication about perceived needs and how to meet them. They shared their insights about what was happening for the group and agreed at each step along the way on how to proceed within the overall structure for the program. From the outset, the intention was to remain flexible and adaptive so that the group could take the conversation deep and specific, as appropriate. The content was to be relevant to the group’s particular concerns while staying on track with overall program objectives.

The pre-program trust survey data heightened the perceived urgency and brought home the relevance of the conversation about how trust and betrayal dynamics play out in leadership and collaboration. As predicted, the survey data revealed that the group enjoys a relatively strong level of trust. However, there were some surprising results, which inspired the group to look more deeply at many issues. For example, although team members respect the high level of individual competencies, the survey data results indicated that there was considerable room for improvement in helping one another learn. Also, the

survey results revealed a perception by some that work is routinely sabotaged and that gossiping and back-biting are present within the leadership team.

Responses to “What impacted you most about this program?” on the participant evaluation included the following:

- I became aware of some major issues within the management team.
- The insights, commitment and learning attitude of the participants.
- The survey instrument was very useful.
- I need to be more involved, proactive and deal with things/issues as they come up.
- We recognized our diversity and ability to collaborate more broadly across program lines, and we pledged to do that.
- The discussion and interaction stimulated by the course and participants.
- Actually taking action on issues (asap) is the most important issue I am taking away.
- The intense feeling of surprise at the survey results and how everyone worked toward the “why.”
- Learning about the types of trust and the steps for overcoming betrayal.
- Discussions of leadership; self-examination; interactions in learning more about others.

#### **EMERGING COLLABORATIVE OUTCOMES AND FOLLOW-UP**

In conversations during the two-day workshop, all participants expressed appreciation for the willingness of their colleagues to engage in conversations —sometimes difficult or sensitive ones — that would promote greater collaboration. They began to explore creative ways to meet current and foreseeable challenges and to overcome and work around systemic and personal boundaries that have evolved over the years.

Specifically, the group agreed to the following action items by the close of the program:

- Reenergize staff through a compelling collective vision and a clear set of growth opportunities.
- Confirm/adjust our vision and mission and agree on proactive investment/disinvestments opportunities.
- Promote self-correcting organization by practicing behaviors that enhance collaboration and trust building. Get festering issues surface and move for resolution. Identify problems more quickly.
- Include and integrate those team members who are absent.
- Examine and adjust recognition processes to celebrate true successes that demonstrate collaborative, innovative accomplishments.
- Use Center Leadership Team Meetings to address concerns and challenges rather than reporting of activities. Use the time to stay connected, interact and exchange information. Adopt additional reporting mechanisms to be sure director stays informed of program happenings.

Two months after the program, Margie observed ongoing discourse among team members and with others about the issues raised in the program, including the following results:

- We changed to nature of our weekly team meeting to discuss important strategic issues and concerns such as: critical staffing skills for the future, approaches for interactions with our governmental relations group, how to reward teamwork, etc.

- Several collaborative initiatives between members of the team began. Examples include: planning for a new building to house geothermal and distributed energy professionals; planning for a new energy facility; integration of three technology specific solar energy program efforts (this was catalyzed by direction from our sponsor, but has been easier as a result of the program); and the initiation of a new power electronics project which will be co-funded by several different sponsors and executed by staff in two different business areas.
- Conversations around conflict have incorporated “trust-building” vocabulary and concepts.

Further, members of the leadership team are making innovation a group endeavor. They know to expect setbacks and can use new strategies to help them recover as they continue moving forward in a spirit of openness and collaboration.

Eighteen months after the completion of the first program, the team continues to improve its ability to constructively collaborate. Two members of the leadership team conducted a second “Meeting the Challenge” program to engage the technical and administrative staff in a dialogue about trust and collaborations. Although the discussions in this second program were difficult and contentious at times, the program created an opportunity for employees to raise important issues about trust in a way that they had never before experienced in the workplace. This has improved the working environment in the center as these issues are now raised much more frequently.

## **ABOUT THE AUTHORS**

Marjorie (Margie) L. Tatro is Director of the Energy and Transportation Security Center at Sandia National Laboratories. Margie currently leads a group of approximately 120 people working to make the nation’s energy and air transportation systems safer, more secure, and more reliable. She is responsible for a portfolio of programs that include a \$12M fossil energy program, a \$40M renewable and energy storage program, and \$5M of infrastructure programs (energy and transportation). She has worked in renewable energy research, facilities design, software design, and energy reliability groups while at Sandia. Margie holds BS and MS degrees in mechanical engineering and has been employed by Sandia National Labs since 1985. Margie is a member of the Central New Mexico Section of the Society of Women Engineers as well as the American Society of Mechanical Engineers and has served on the Board of Directors of the New Mexico Engineering Foundation.

Beata C. Lewis, JD, MSC, founder of Bridging Lives ([www.BridgingLives.com](http://www.BridgingLives.com)), has 15+ years experience in law and business. As a leadership coach and consultant, she helps individuals and groups develop awareness, practices and processes for leadership and collaborative excellence. Beata emphasizes core competencies for building and restoring trust, essential for cultivating more productive, creative and adaptive business relationships and organizational cultures. Her leadership coaching is distinguished by a holistic, integrated approach that includes somatic awareness and practices to develop a more powerful, congruent leadership presence. Clients range from high-tech and bio-tech companies, boards of directors, non-profit and arts organizations, federal and state agencies, individual entrepreneurs and service professionals. In January 2003, Beata launched a study: The Feminine Face of Leadership in Science.