

JAMES M. KOUZES | BARRY Z. POSNER

WITH JANE BOZARTH

the
challenge
continues

PARTICIPANT WORKBOOK

inspire a
shared vision

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Why *The Challenge Continues?*

We're assuming that you have completed a Leadership Challenge event and the *Leadership Practices Inventory* (LPI), are familiar with The Five Practices Model, and have had some experience in **living The Five Practices.**

You may have developed and begun to implement your vision. You may already have embarked on—or even completed—a **challenge project** using The Five Practices framework. Completing the activities in this workbook will help to support and sustain the work you already have begun on your **journey to becoming a stronger leader.**



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PRACTICE 2

INSPIRE A SHARED VISION





**Envision the future
by imagining exciting
and ennobling
possibilities.**

**Enlist others in a
common vision by
appealing to shared
aspirations.**

Small Wins

As you may recall, the second practice of exemplary leadership, Inspire a Shared Vision, includes two Commitments, as shown on the previous page.

In continuing the process of learning to Inspire a Shared Vision, you will work to further refine your vision for the future as well as increase your capacity to enlist others in sharing your vision.

When did you first begin to implement strategies for Inspire a Shared Vision?

Month _____ Year _____

A key tenet of *The Leadership Challenge* is the idea that success is built from small wins. In the trenches, day-to-day, and in the face of mistakes and obstacles, it is easy to lose sight of this. Leadership is a journey. Before you continue your journey to Inspire a Shared Vision, take a few minutes to document some successes you have had so far. Write down a few specific things that have gone well at work in the past six months. Think “small wins” (base hits rather than grand slams).

Now look over your list of small wins. Take a moment to savor them. Although this workbook will help you continue to learn how to Inspire a Shared Vision, it is critical that you not fall into the trap of focusing only on things that did not go well and things that still need work. Your wins are important and should not be discounted. Give yourself a pat on the back! Go ahead; *really* give yourself a pat on the back.



Rate Yourself

Below are the six behaviors from the *Leadership Practices Inventory* (LPI) related to Inspire a Shared Vision. If you completed the LPI some time ago and have retaken it recently in preparation for this professional-development experience, write your scores for “then” and “now” in the spaces provided. (If you have not taken the LPI, you will be given a few minutes to take it now.) Where do you think you are strongest? Circle those items. What areas would you like to work on further? Put an asterisk beside those items.



THEN

NOW

2. I talk about future trends that will influence how our work gets done.

7. I describe a compelling image of what our future could be like.

12. I appeal to others to share an exciting dream of the future.

17. I show others how their long-term interests can be realized by enlisting in a common vision.

22. I paint the “big picture” of what we aspire to accomplish.

27. I speak with genuine conviction about the higher meaning and purpose of our work.

NOTES:

Handwriting practice area with 10 sets of lines. Each set consists of a solid top line, a dashed middle line, and a solid bottom line.



Describe Your Vision

What is your vision? Take a few moments to recall the vision statement you wrote earlier.

Is there anything about your vision that you might revise now that you have been working on it for some time?

Ideal (a high standard to aspire to). Visions are about hopes and aspirations. They're about making a difference. They tell us the ennobling purpose and greater good we are seeking.

Unique (pride in being different, an identity). Visions are about the extraordinary. They are about what makes us distinctive, singular, and unequalled.

Image (a concept or mental picture made real or tangible through descriptive language). Word pictures, metaphors, examples, stories, symbols, and similar communication methods all help to make visions memorable.



Future-Oriented (looking toward a destination). Visions describe an exciting possibility for the future. They stretch our minds out into the future and ask us to dream.

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Common Good (a way people can come together). Visions are about developing a shared sense of destiny. Leaders must be able to show others how their interests are served and how they are a part of the vision in order to enlist others in it.

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Think about the past several months, as you attempted to implement your vision. Make notes about some of your results.

Element of My Vision

Visible Results

Element of My Vision	Visible Results
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How I Inspire a Shared Vision

Now describe three situations—decisions you made, interactions with others, situations that required you to act, and/or events in which you set an example (although not necessarily the example you meant to set). These are times in which you had an opportunity to Inspire a Shared Vision. In the space provided, describe how you acted. Were you credible? For each situation, rate yourself on a scale of 1 to 5 (one being lowest). Then describe what you could have done differently—how could you have been more effective—and what you will do to be more effective in this practice in the future.

SITUATION 1:

.....

.....

Rating (circle) 1 2 3 4 5

What I could have done differently:

.....

.....

In the future I will try to:

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SITUATION 2:

.....

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Rating (circle) 1 2 3 4 5

What I could have done differently:

.....

.....

In the future I will try to:

.....

.....



SITUATION 3:



.....

.....

Rating (circle) 1 2 3 4 5

What I could have done differently:

.....

.....

In the future I will try to:

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.....

Hindsight Is 20/20

You probably have been thinking about your end result—the future of your vision—in immediate terms: what you’d like to see right away and where you’d like your group to be in a year. It also is tempting to fall into the trap of what you plan to accomplish “someday.” Try the trick of “backward” vision: seeing the future first and then visualizing the process of getting there.

As you have been working with the concept and practice of developing and sharing a vision, you have learned from experience. For instance, you may have found that change has come much more slowly than you had imagined or that people did not embrace your vision as quickly as you had hoped. Although you may have found that frustrating, it has given you the gift of hindsight. Let’s put that gift to use.

Now take a few minutes to think about your legacy. When you leave your current job, your unit, or your company, what do you want to say you accomplished? How do you want your work, and that of those you have led, to be remembered?

Legacy:

.....

.....





First, read Jim and Barry's comments on "legacy":

ARE YOU ON THIS PLANET TO DO SOMETHING, OR ARE YOU HERE JUST FOR SOMETHING TO DO?

If you are on this planet to do something, then what is it? What difference will you make? What will be your legacy?

Leadership is not solely about producing results. That is, success in leadership is not measured only in numbers. Being a leader brings with it a responsibility to do something of significance that makes families, communities, work organizations, nations, and the world better than they are today. Not all these things can be quantified.

Our own studies, as well as those of many other authors and scholars who have explored leadership, have shown that leadership often begins with pain and suffering (our own and in the conditions of others).



Our colleague Patrick Lencioni, the author of several best-selling books, told us that when he graduated from college he “wanted to change the world. Call it what you will, I was determined to make a difference.” However, the problem with this zeal, he went on to explain, was that he hadn’t thought deeply enough about two fundamental matters: “Who am I really serving? And am I ready to suffer?”

Here are a few other questions that might help to trigger thoughts about legacy.

- What will be your greatest contributions to your family?
- What will be your greatest contributions to your friends?
- What will be your greatest contributions to those you’ve lead?
- What will be your greatest contributions to your organization?
- What will be your greatest contributions to your community?

Quoted from J.M. Kouzes and B.Z Posner. (2006). *A Leader’s Legacy* (pp. 1-3). San Francisco: Jossey-Bass.



Plan for Achieving Your Legacy

Following is a worksheet for using your “hindsight” when thinking about your legacy.

FUTURE DATE (job change, retirement, etc.): _____

1. Six months prior to that, I will and/or my team will:

.....

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2. One year prior to that, I will and/or my team will:

.....

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3. Eighteen months prior to that, I will and/or my team will:

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4. Two years prior to that, I will and/or my team will:

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5. Two and one-half years prior to that, I will and/or my team will:

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6. Three years prior to that, I will and/or my team will:

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7. Three and one-half years prior to that, I will and/or my team will:

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8. Four years prior to that, I will and/or my team will:

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TODAY'S DATE: _____



Change Your Focus

LEAD, DON'T MANAGE

In seeking to Inspire a Shared Vision, it's important to focus on the "inspiration" aspect. Having a vision is one thing; making it a reality is quite another. Managers manage; leaders lead. Implementing a vision requires leadership. How much time are you devoting to your vision? Are you working primarily on solving problems or on finding opportunities to boost the energy, enthusiasm, and potential of others?

Behavior	Manager	Leader
Focuses on improvement		
Focuses on innovation		
Seeks continuity		
Seeks change		
Doing the right things		
Doing things right		
Plans strategy		
Plans tactics		
Sets standards of excellence		
Sets standards of performance		
Avoids anarchy		
Overcomes inertia		
Implementation of vision		
Vision		
Actions are character-based		
Actions are skill-based		
Tells		
Persuades		
Sets standards of performance		
Sets standards of excellence		





ARE YOU A MANAGER OR A LEADER?

Managing and leading both involve important skill sets, but they are different. In which role are you most comfortable? Why?

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Based on your learning here, what will you do more of?

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What will you do less of?

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HELP THOSE YOU LEAD FIND PURPOSE AND MEANING

In order to Inspire a Shared Vision, a leader must ensure that everyone is “on the same page.” We all know of times when the line staff did not seem to share management’s view. For instance, you may have dealt with a company representative who seemed to believe that his or her job was to complete paperwork rather than to deal with clients or customers. Leaders sometimes are surprised to find that a constituent defines his or her job role very differently than he or she does.

There is an old anecdote about a passerby who came across a large construction site. Three tired, sweaty men were resting with their jackhammers, taking a break from the hot afternoon sun. The passerby asked the three men what they were doing.

The first worker said, "I'm breaking up rock."

The second worker said, "I'm earning a living."

The third worker said, "I'm building a cathedral."

How would those whom you lead define their jobs? Are they shipping surgical materials to pediatric hospitals or saving the lives of sick children? Are they assembling electronic components or creating the technology that holds a city's 911 system together? Is one of them "just an administrative assistant" or a critical link between visually impaired clients and the resources they need? It will be hard for your constituents to share your vision if they do not see purpose and meaning in what they do.

Walk around tomorrow and ask your people what they do and why they do it. The answers might surprise you. The "big picture" can be hard to keep in sight when you're working in the trenches day after day.

Do those whom you lead understand their parts in the big picture of your organization's work? What is the purpose and meaning of the work done by those you lead?

What are some strategies you can use to help them see their "big picture" roles?



How can this help you move everyone toward a shared vision?

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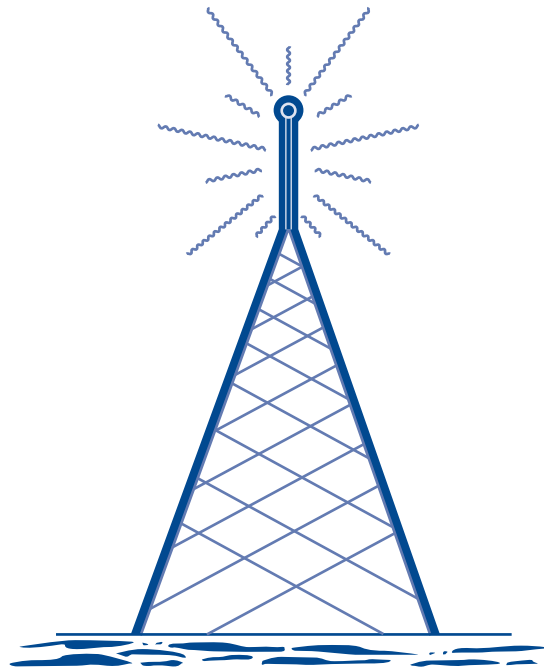


“ A shared vision
is not just an idea,
but a force in people’s
hearts.”

—WILLIAM GAMSON

WII-FM

ENLIST OTHERS IN YOUR VISION!



What happens when your favorite song comes on the radio? Do you smile? Do you sing along? Do you feel your pulse quicken? If you hear a march or a song that sparks a particular memory, do you get goose bumps? How about a song you dislike? Do you grit your teeth and wait it through, switch to another station, or just turn the radio off?

What happens when you mention your vision to your constituents? Do they smile and “sing along” or do they grimace, roll their eyes, and give one another knowing looks?

As a leader, you are like a radio station, and your constituents are your listeners. You are station WII-FM, and your listeners are asking, “What’s in It for Me?” What songs do they need and want to hear? How can you tie your vision to the songs that will make them want to sing along?

In the spaces that follow, list the names of people you lead or people on whom the successful implementation of your vision depends. What “songs” do they need to hear? What motivates and appeals to them? What is *their* vision? There are additional pages at the end of the workbook if you need more space.

Name: _____

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Name: _____

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Name: _____

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Name: _____

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Name: _____

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Name: _____

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In your earlier work with *The Leadership Challenge* materials, you were asked to tell, write, or think about your “personal best” story. Now try to expand that idea to those on whom the realization of your vision depends.

If you were to approach these people, what would they say their “personal best” has been? Where do they shine? Think of your constituents, especially those who seem to be less receptive to your vision. (You also may want to encourage them to write and share their personal best stories.)

Remember: Inspiring is not just informing. If the song they want to hear isn’t playing on station WII-FM, they can change to another station. Or they can turn the radio off.

NOTES:

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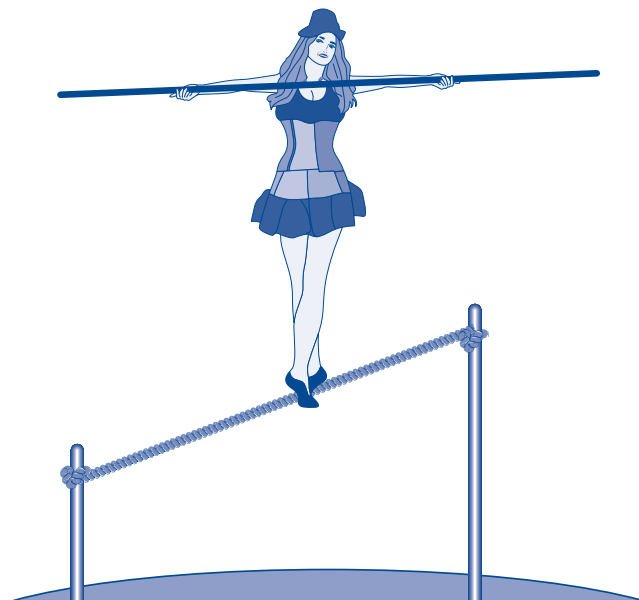


Inspire a Shared Vision: A Matter of Scope?

The Work Group for Community Health and Development at the University of Kansas (<http://www.communityhealth.ku.edu>) is devoted to helping others *Inspire a Shared Vision* of better communities. The group offers this advice:

“If you are still having trouble communicating your vision, you may be approaching others with a picture that is just too big. You may need to communicate the parts of your vision that people can relate to. They may not be ready to think about an overall plan for transforming your neighborhood. However, they may be able to think about doing something about the potholes in the streets. If so, talk about potholes. Talk to people ‘where they’re at.’ Speak to their conditions and their personal needs. This will help you build some trusting relationships. Later, you can do more.”

“On the other hand, sometimes it is important to say things that people are not quite ready to hear. People need to think about new ideas over a period of time before they can make sense of them. It is important to introduce new ideas, even if they engender initial resistance. Often the strongest and most important ideas meet with resistance.”



Trying to Inspire a Shared Vision sometimes can be a balancing act. The leader must meet people where they are and challenge them at the same time.

A leader has to lead. The most important aspect of leadership is winning over the thinking of people to a vision of what things can be like.

This can take time. You may need to be gentle but also persistent.

In order to create and communicate a vision, you must be courageous. People who communicate a vision of what things should be like often are the people who are courageous enough to state what is obviously wrong and unjust. It can be difficult to say out loud that the prince has no clothes. However, once you say it, people will see that it is true.





“ The message you send may be more than the sum of your words. What physical and attitudinal messages are you sending? Getting a vision off the ground means everyone is enthusiastic and on board. Creating a workplace with ‘buzz’ should be every leader’s objective. People want leaders who are positive and optimistic. They want leaders who are inspiring and full of hope for the future.”

JIM KOUZES AND BARRY POSNER

Future Trends

The leader who can Inspire a Shared Vision is one who can envision future trends. Consider the following.

- HG Wells in *20,000 Leagues Under the Sea* (1875) describes a way for humans to dive into the ocean that involves compressed air in a tank “fixed on the back by means of braces, like a soldier’s knapsack.”
- Robert Heinlein, in *Stranger in a Strange Land* (1961) describes a television screen disguised as an aquarium with fish swimming around. Have you ever seen an “aquarium” screensaver?
- In 1999, Philco-Ford produced a video that predicted that, in the late 20th century, consumers would be paying bills and shopping via home “consoles.”

What do you see happening in the next twenty years?

What age will you be then? _____

What will your life be like then?

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What sort of professional reading are you doing? What are the predictions regarding the future of your industry and the products you make or the services you provide? What are your competitors or others in similar businesses doing? Where can you learn more about trends in your work area?

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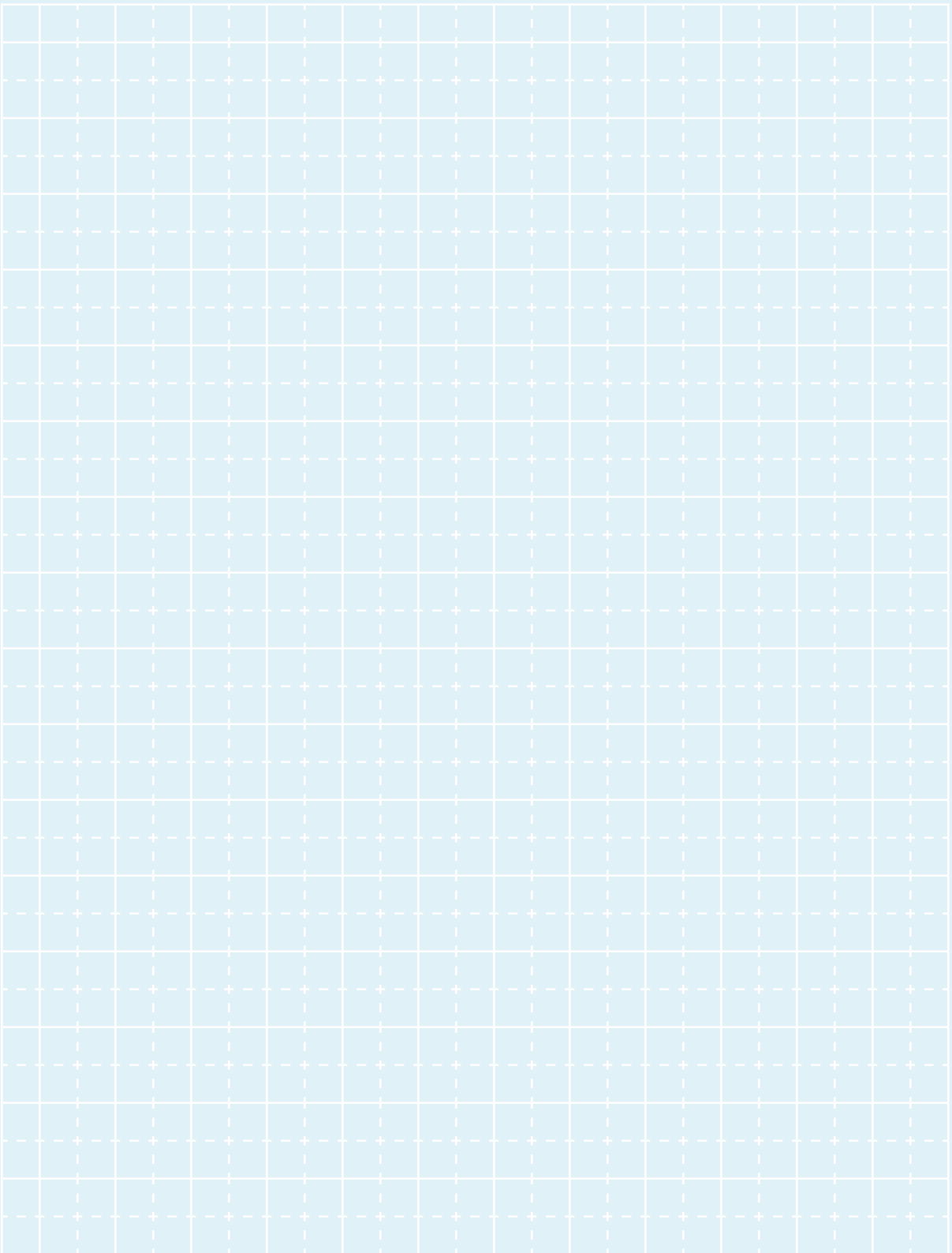


WHAT NEXT?

Suppose that your CEO is creating an Office of Vision and is looking for someone to lead it. What would you say at the interview? What would you say your vision is? What you have done so far to implement it? What do you still need to do to inspire others to share in your vision?

LAST WORDS ON VISION, LEGACY, AND THE FUTURE

When the world's oldest living woman died on January 2, 2009, at the age of 115, Tim O'Reilly asked on Twitter: "When will you be 115? What will you do between now and then?" Use your imagination and answer those questions.



Action Plan

Successful journeys involve planning and maps. What is your “map” for continuing your journey to Inspire a Shared Vision? Take some time to answer the following questions.

1. I have had a number of small wins in my efforts to Inspire a Shared Vision. Some of these are:

2. As I continue to learn to Inspire a Shared Vision, I would like to improve at:

3. I will post my “hindsight” plan in plain sight at:



4. I will work to develop my knowledge of trends by:

.....

.....

5. I will spend more time leading and less time managing by:

.....

.....

6. I will work with my constituents to align their visions with mine by:

..... starting
on (date)

7. I will do a self-check on how well I Inspire a Shared Vision every
weeks/months. I will put this on my calendar now.



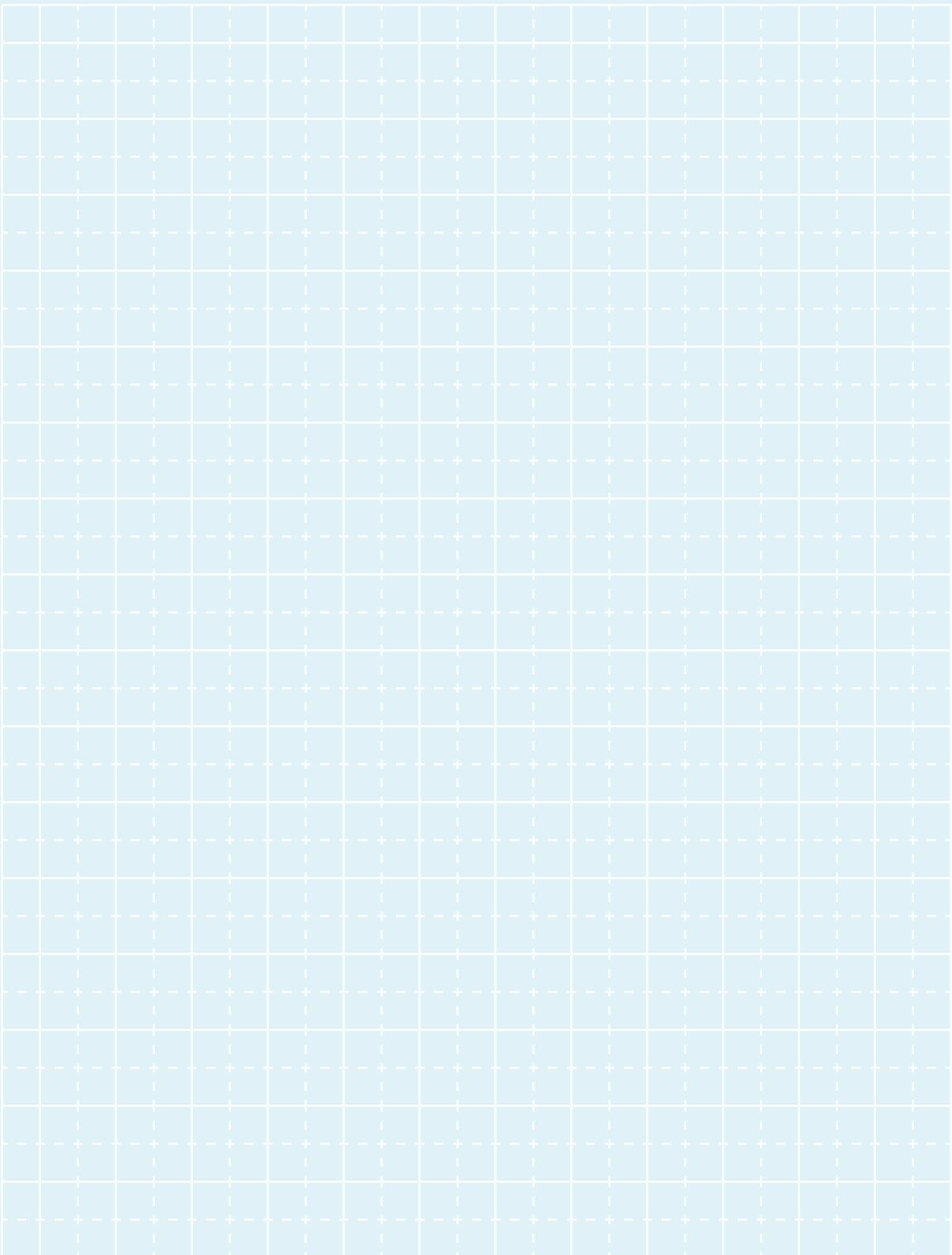
Additional Resources

Stephen Covey's book, *The Seven Habits of Highly Effective People*, describes a model called the "Circles of Influence." Covey invites the reader to differentiate circumstances, actions, and attitudes that (realistically) can be changed from those that cannot be changed.

If you are having difficulty helping others to "see" your vision, you might consider taking part in a professional-development event on presentation skills.

ABOUT THE AUTHORS





About the Authors

Jim Kouzes and Barry Posner are co-authors of the award-winning and best-selling book, *The Leadership Challenge*. This book was selected as one of the Top 10 books on leadership of all time (according to *The 100 Best Business Books of All Time*), won the James A. Hamilton Hospital Administrators' Book-of-the-Year Award and the Critics' Choice Award from the nation's book review editors, was a *BusinessWeek* best-seller, and has sold over 1.8 million copies in more than twenty languages. Jim and Barry have co-authored more than a dozen other leadership books, including *A Leader's Legacy*—selected by *Soundview Executive Book Summaries* as one of the top thirty books of the year—*Credibility: How Leaders Gain It and Lose It, Why People Demand It*—chosen by *Industry Week* as one of its year's five best management books—*Encouraging the Heart*, *The Student Leadership Challenge*, and *The Academic Administrator's Guide to Exemplary Leadership*. They also developed the highly acclaimed *Leadership Practices Inventory* (LPI), a 360-degree questionnaire for assessing leadership behavior, which is one of the most widely used leadership assessment instruments in the world. More than four hundred doctoral dissertations and academic research projects have been based on the Five Practices of Exemplary Leadership model.





Among the honors and awards that Jim and Barry have received are the American Society for Training and Development's (ASTD) highest award for their Distinguished Contribution to Workplace Learning and Performance; Management/Leadership Educators of the Year by the International Management Council (this honor puts them in the company of Ken Blanchard, Stephen Covey, Peter Drucker, Edward Deming, Frances Hesselbein, Lee Iacocca, Rosabeth Moss Kanter, Norman Vincent Peale, and Tom Peters, who are all past recipients of the award); and named among the Top 50 Leadership Coaches in the nation (according to *Coaching for Leadership*).

Jim and Barry are frequent conference speakers, and each has conducted leadership development programs for hundreds of organizations, including Apple, Applied Materials, ARCO, AT&T, Australia Post, Bank of America, Bose, Charles Schwab, Cisco Systems, Community Leadership Association, Conference Board of Canada, Consumers Energy, Dell Computer, Deloitte Touche, Dorothy Wylie Nursing Leadership Institute, Egon Zehnder International, Federal Express, Gymboree, Hewlett-Packard, IBM, Jobs DR-Singapore, Johnson & Johnson, Kaiser Foundation Health Plans and Hospitals, L. L. Bean, Lawrence Livermore National Labs, Lucile Packard Children's Hospital, Merck, Mervyn's, Motorola, NetApp, Northrop Grumman, Roche Bioscience, Siemens, Standard Aero, Sun Microsystems, 3M, Toyota, the U.S. Postal Service, United Way, USAA, Verizon, VISA, and The Walt Disney Company.

Jim Kouzes is the Dean's Executive Professor of Leadership, Leavey School of Business, at Santa Clara University. Not only is he a highly regarded leadership scholar and an experienced executive, but *The Wall Street Journal* has cited him as one of the twelve best executive educators in the United States. In 2006 Jim was presented with the Golden Gavel, the highest honor awarded by Toastmasters International. Jim served as president, CEO, and chairman of the Tom Peters Company from 1988 through 1999, and prior to that led the Executive Development Center at Santa Clara University (1981-1987). Jim founded the Joint Center for Human Services Development at San Jose State University (1972-1980) and was on the staff of the School of Social Work, University of Texas. His career in training and development began in 1969 when he conducted seminars for Community Action Agency staff and volunteers in the war on poverty effort. Following graduation from Michigan State University (B.A. with honors in political science), he served as a Peace Corps volunteer (1967-1969). Jim also received a certificate from San Jose State University's School of Business for completion of the internship in organization development. Jim can be reached at jim@kouzes.com.

Barry Posner is professor of leadership at Santa Clara University (Silicon Valley, California), where he has received numerous teaching and innovation awards and served as dean of the Leavey School of Business for twelve years (1996-2009). An internationally renowned scholar and educator, Barry is author or co-author of more than a hundred



research and practitioner-focused articles. He currently serves on the editorial review boards for *Leadership and Organizational Development*, *Leadership Review*, and *The International Journal of Servant-Leadership*. Barry is a warm and engaging conference speaker and dynamic workshop facilitator. Barry received his baccalaureate degree with honors from the University of California, Santa Barbara, in political science; his master's degree from The Ohio State University in public administration; and his doctoral degree from the University of Massachusetts, Amherst, in organizational behavior and administrative theory. Having consulted with a wide variety of public and private sector organizations around the globe, Barry currently sits on the board of director of EMQ Family First. He has served previously on the board of the American Institute of Architects (AIA), Junior Achievement of Silicon Valley and Monterey Bay, San Jose Repertory Theater, Public Allies, Big Brothers/Big Sisters of Santa Clara County, the Center for Excellence in Nonprofits, Sigma Phi Epsilon Fraternity, and several start-up companies. Barry can be reached at bposner@scu.edu.

Jane Bozarth is an internationally known trainer, speaker, and author. A training practitioner since 1989, Jane is a graduate of the University of North Carolina at Chapel Hill, has an M.Ed. in training and development/technology in training from North Carolina State University, and holds a doctorate in adult education/training and development. She is an accomplished training practitioner and her work in virtual classroom training design and delivery has garnered her Live and Online and *Training* magazine Editor's Pick Awards. Jane is also the recipient of a North Carolina State University Alumni Award for outstanding contributions to the training profession.

She enjoys business writing and, in addition to her regular column in *Training*, Jane's work has appeared in trade and academic journals and as book chapters. She is the author of Pfeiffer's *e-Learning Solutions on a Shoestring*; *Better Than Bullet Points: Creating Engaging e-Learning with PowerPoint*; *From Analysis to Evaluation*; and the forthcoming *Social Media in Training*. Jane Bozarth and her husband, Kent Underwood, live in Durham, North Carolina. She can be contacted via her website at <http://wwwbozarthzone.com>.

NOTES:

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