

Moving Through the Zones

A Guide for Leading so Both People & Purpose Thrive



If you believe people are the engine of purpose-driven work, this is for you.

If you've ever wondered why some teams thrive while others spiral, this is for you.

The answer is culture, and culture is already happening — The question is: *Who's leading it? And in what direction?*

Moving Through the Zones is a people-centered leadership framework designed to help mission-driven organizations name where they are, reflect on what's working (and what's not), and intentionally build the conditions where both people and purpose can thrive. Rooted in research, sharpened by practice, and made memorable through metaphor, this framework helps leaders examine four essential dimensions of leadership — Vision, Trust & Belonging, Collaboration, and Growth — and understand how leadership actions move each of them forward (or backward).

- **Vision** — Vision is more than just having a mission on your website and walls. It's about having a clear, actionable, and clearly communicated plan to lead three connected elements of an impactful vision. 1) Purpose. 2) Specific theory of action. 3) Adaptation for an ever-changing landscape. It's not just the what, it's the why and the how. It's about ensuring everyone moves on purpose and with purpose in perfect alignment.
- **Trust & Belonging** — Trust and belonging are the foundation for everything. Research shows that psychological safety not only results in better and more diverse engagement and retention but also in team members sharing information, asking for help, clarifying misunderstandings, and coordinating more effectively. In contrast, cultures that lack trust and belonging suppress critical communication, leading to execution breakdowns.
- **Collaboration** — Studies show that groups combining diverse expertise, perspectives, and experiences outperform homogenous or siloed groups — but only if they collaborate well. Cross-functional collaboration fuels adaptive problem-solving and innovation. Additionally, research into cognitive biases like "The Ikea Effect" shows that the psychological ownership that comes when someone contributes to building something means they value it more than even an identical thing they didn't help build. This ownership is invaluable when it comes to investing people in initiatives and decisions.
- **Growth** — Research shows psychological safety is the single most important factor in determining team success, more than intelligence or experience. Why? Because organizations that focus on progress more than perfection create a trusting environment where mistakes are surfaced and learned from, not vilified and hidden. For mission-driven and fast-changing contexts (schools, nonprofits, etc), the unwavering belief that everyone can grow and the ability to learn, adapt quickly, and improve individually and collectively is one of the strongest drivers of impact.

What's in the Framework

For each dimension, the framework provides:

An Essential Question to ask of each dimension of leadership culture. Effective leaders and teams will be able to answer a strong "yes".

Mantra(s) to center thoughts aligned to effective, human-centered leadership for you and your team. Cognitive Behavioral Therapy (oversimplified) is predicated on the idea that our thoughts shape our behavior. Mantra(s) act as a reminder of those thoughts.

Descriptors and Observable Behaviors for the zones are concrete practices and signals visible through walk-throughs, observations, interviews, and reflection that differentiate the five progressive Zones. It's what you'd see, hear, and experience for leadership in that zone.

Tools, Skills, and Resources — A non-exhaustive list to guide you and your team's development through the zones. Use these to leverage strengths and work on an area of leadership growth.

How to use the Framework

Moving Through the Zones is a developmental tool. It is not a compliance rubric. It is designed to help leadership teams:

- **Reflect** honestly on where you are today in each dimension. Find your leadership superpowers and areas of growth.
- **Set Goals** for where you want to be and monitor progress
- **Plan leadership moves** that leverage your strengths to progress through the Zones

It can be used in:

- Leadership team retreats and self-reflection
- One-on-one leadership coaching
- Walk-throughs and culture observations
- Staff interviews and listening sessions
- Progress monitoring of leadership and culture-building efforts

What's NOT in the Framework

These are incredibly important, but this framework is a tool for leading and developing culture and people, one that functions across sectors

- Equitable and Inclusive practices for effective, diverse hiring

- Programmatic strategies
- Financial and operational leadership
- Skills like organization, time management, etc.

Your leadership is in a zone, whether you know it or not. Name where you are, and move with purpose to where you want to be.

VISION

Can everyone describe how their role aligns with the organization's mission and strategy?

Mantra(s):

- Mission moves hearts. Strategy moves mountains.
- Without a vision, any motion is mistaken for progress.

The Zones:

<u>#1</u> <u>"Naked and Afraid"</u>	<u>#2</u> <u>"Treasure Map"</u>	<u>#3</u> <u>"Celestial Navigation"</u>	<u>#4</u> <u>"Mapquest"</u>	<u>#5</u> <u>"GPS"</u>
The Survival/No Strategy Zone	The Destination without Strategy Zone	The Unclear or Ineffective Strategy Zone	The Clear but Rigid Strategy Zone	The Adaptive Strategy Zone
The organization is lost and without clear direction. People are reacting to immediate needs without a shared sense of purpose or end goal. Energy is scattered and often driven by fear or urgency.	There is a clear goal or destination, but no coherent or actionable plan to get there. Progress relies on intuition or luck, and individuals interpret the path in inconsistent ways.	A destination and a general plan exist, but the tools and processes are imprecise, outdated, or difficult to manage. Course corrections are possible, but cumbersome. Progress is uneven and often relies on expert interpretation.	There is a clear destination and a defined plan to get there. The plan provides useful guidance, but it is static, not adaptive to changing circumstances or emerging opportunities. The team may stay on track, but struggles to respond to new information.	The organization operates with a clear and adaptive vision. Both destination and plan are well-understood and shared across the team. The path can adjust in response to new information, learning, or changing conditions, while keeping everyone clear and aligned on shared purpose and specific value proposition, and strategic advantage the org leverages.

What you'd see, hear, or experience

<ul style="list-style-type: none">• Staff give inconsistent or vague answers about the mission or strategy• Decisions driven by immediate crises or external pressures• No common language about	<ul style="list-style-type: none">• Leaders talk about big goals, but staff can't articulate steps to get there• Staff describe their work without connecting it to overall outcomes• Teams prioritize	<ul style="list-style-type: none">• Staff reference old or conflicting strategies• Decision-making lacks transparency or consistency• Different teams follow different or conflicting paths• Staff rely on	<ul style="list-style-type: none">• Staff can state the strategy, but describe it as inflexible• "That's how we've done it" is used as justification without full reflection on effectiveness• New opportunities	<ul style="list-style-type: none">• Staff consistently describe how their role connects to the mission and strategy• Strategy genuinely reflects a competitive advantage/Value proposition• Leaders reference
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organizational priorities <ul style="list-style-type: none"> • Meetings focus on urgent tasks, not strategic goals 	based on personal judgment or leader preferences <ul style="list-style-type: none"> • Mission language is posted but not referenced in daily work 	workarounds rather than aligned systems	are dismissed if not in the existing plan <ul style="list-style-type: none"> • Metrics are tracked but not adapted based on learning 	strategy in decisions and goal-setting <ul style="list-style-type: none"> • Teams adjust plans in response to new data or feedback • Cross-team alignment is evident in shared priorities and actions
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How to move up through the zones? – Tools, Skills, and Resources:

Need help identifying your mission and theory of action?

- Guide to developing strategy (Strategy as an iterative series of choices)
 - Choose your Aspiration/Challenge.
 - Choose your Lane.
 - Choose your Game.
 - Choose your Tools.
 - Choose your next challenge.
- Strategic and Priority Planning
 - Goals vs. Drivers
 - SMART Goals
 - KPI
- Leadership Retreat/Task Force Tactics
 - Pre-Mortem(s)
 - ProACT
 - Stakeholder Mapping
- Profile of a “Graduate”
- What are your “recurring moments”, and how can you plan for them in advance?

Need help communicating it clearly and persuasively?

- Strategy Storytelling
 - The Golden Circle a.k.a. Start with the why
 - Developing your elevator pitch

Need help pivoting and leading that change?

- Adaptive Leadership (A model based on adaptations from evolutionary biology)
 - Technical Problems vs. Adaptive Challenges
 - Leveraging adaptive elements: Priorities, Beliefs, Habits, and Loyalties
 - Navigating the “Swirling Mass of Energy” of change
- Managing Transitions
 - Aligned and Trained Leadership Team
 - Leading through the three phases
 - Letting Go
 - The Neutral Zone
 - The New Beginning
 - Clear, consistent, and predictable communication throughout the transition(s)
 - Sell the problem

TRUST & BELONGING

Can everyone bring their full, authentic self to all their work and workplace interactions?

Mantra(s):

- Trust is the currency of leadership. Invest in it daily.

The Zones:

#1 “Used Car Salesman”	#2 “Receptionist”	#3 “Tour Guide”	#4 “Kitchen Table”	#5 “Chosen Family”
The Distrust Zone	The Transactional Trust Zone	The Conditional Trust Zone	The Emerging Trust & Belonging Zone	The Deep Trust & Belonging Zone
Interactions are transactional, self-interested, or manipulative. People feel the need to guard themselves and assume hidden agendas. Trust is absent; relationships are defined by skepticism and self-protection.	Interactions are polite and professional, but scripted and surface-level. Individuals are welcomed formally but not meaningfully engaged. Trust remains shallow, and a sense of authentic belonging is lacking.	Individuals are invited in and shown the organization’s culture and values, but in a curated, controlled manner. Participation is limited, and trust is conditional. People are observers more than contributors.	People are invited into a trusted, informal space where voices are valued and authentic contributions are welcomed. Relationships are built on mutual respect, vulnerability, and shared experience. Trust deepens through open dialogue and collaboration.	The organization operates as an intentional community of deep trust and belonging. Differences are embraced, and individuals feel seen, valued, and empowered to contribute fully. Leadership and team members share ownership for sustaining a culture of trust, care, and inclusion, modeling authentic belonging to stakeholders and community.

What you’d see, hear, or experience

<ul style="list-style-type: none">• Staff avoid speaking up in meetings• Body language is guarded; side conversations are common• Limited cross-team or cross-level interactions• Staff express fear of retaliation or blame	<ul style="list-style-type: none">• Meetings are polite but lack challenge or debate• Staff say “that’s not my place” or defer to authority• Feedback is sanitized or only positive• Social cliques or silos are visible• Feedback is	<ul style="list-style-type: none">• Leaders invite input, but some staff hesitate to participate• Staff qualify comments with “I’m not sure if this is okay to say...”• Participation is uneven across identity groups or roles	<ul style="list-style-type: none">• Staff openly ask questions or admit mistakes• Candid feedback is exchanged peer-to-peer• Team norms include explicit practices to build trust• Cross-team celebrations of	<ul style="list-style-type: none">• Staff consistently report feeling safe, valued, and heard• Meetings show full participation across diverse voices• Difficult conversations happen with care and respect• Staff describe shared
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	collected but not considered or responded to	<ul style="list-style-type: none"> Some teams report high trust, others do not 	success are common	responsibility for a culture of trust and belonging
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How to move up through the zones? – Tools, Skills, and Resources:

Need help building trust and belonging?

- Emotionally Intelligent Leadership
 - Self-Awareness
 - Self-Management
 - Interpersonal and Team Awareness
 - Interpersonal and Team Management
- Psychological Safety Assessment
 - Attached Survey
 - Focus Groups
 - 360 Review
- Communication Structures
 - Transparent and proactive waterfall communication
 - Models honesty, vulnerability, and organizational core values
- Leveraging a commitment tracker for follow-through and being true to your word
- Culturally Sustaining and Competent Practices for DEIA
- Equity Audit
- Restorative Practices
- Leveraging an “I see you” tracker to ensure everyone feels their work is seen and recognized
- Trauma-Informed Practices
 - Teaching and understanding triggers
 - Fight, Flight, Freeze, and Fawn response
 - Moving past performative fawn response to genuine connection

Need help creating shared ownership of trust and belonging?

- Feedback Loops
 - Active, Consistent, and Predictable collection
 - Office Hours
 - Regularly scheduled check-ins
 - Structured into every training, program, or project
 - Responded to consistently (regardless of whether the feedback is acted upon)
- “Care Conversations”
 - A framework and format for training everyone on the types of critical conversations that protect culture and drive results. Trust is not a prerequisite. It’s the product.

COLLABORATION

Do decisions reflect the input of those impacted and show evidence of shared ownership?

Mantra(s):

- It's not about who's right. It's about getting it right.
- The smartest person in the room is always the room.

The Zones:

#1 <u>"Tug-of-war"</u>	#2 <u>"Potluck"</u>	#3 <u>"Three-Legged Race"</u>	#4 <u>"Improv Class"</u>	#5 <u>"Championship Team"</u>
The Conflict & Competition Zone	The Parallel Work Zone	The Awkward Collaboration Zone	The Emerging but Inconsistent Collaboration Zone	The Adaptive & Consistent Collaboration Zone
Teams and individuals pull in different directions, often working on different strategies. Energy is expended, but progress is slow or nonexistent. Competition outweighs collaboration.	People bring individual contributions, but without coordination or shared planning. Some valuable outcomes emerge, but alignment is inconsistent, and efforts may duplicate or conflict.	Teams are connected, but awkwardly. Roles, goals, and processes aren't fully clear or aligned. Collaboration happens, but it requires significant effort, and progress can be clumsy.	Collaboration is dynamic, responsive, and creative. Team members listen actively, build on each other's ideas, and adapt in real time. Trust is strong, and flexibility supports innovation and growth, but the lack of a plan means moments of magic rather than sustained and consistent success.	Teams operate with high trust, shared purpose, and deep alignment. Roles are clear, and collaboration feels seamless. Team members anticipate each other's needs, adapt to changing conditions, and pursue collective success over individual wins.

What you'd see, hear, or experience

<ul style="list-style-type: none">• Teams publicly or privately blame each other for issues• Staff complain about competing priorities or unclear roles• Duplicative or conflicting work is visible• Siloed communication patterns	<ul style="list-style-type: none">• Teams share updates but do not coordinate timelines or processes• "That's their job" language is common• Cross-team input is reactive, not planned• Collaboration happens only when required	<ul style="list-style-type: none">• Teams meet but struggle to make joint decisions• Cross-team meetings lack a clear purpose or outcomes• "I didn't know you were doing that," comments surface• Collaboration feels dependent on individual	<ul style="list-style-type: none">• Some cross-team efforts show strong alignment• Leaders model collaboration in planning and execution• Staff express mixed experiences with collaboration quality• Shared tools and processes for	<ul style="list-style-type: none">• Cross-team collaboration is routine and expected• Staff cite examples of how others' input improved their work• Roles and responsibilities are clearly aligned across teams• Collaboration produces shared
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		relationships, not systems	collaboration are emerging but uneven	ownership of outcomes
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How to move up through the zones? – Tools, Skills, and Resources:

Need help starting a team? (Before you then need to develop it)

- Building the right cross-functional leadership team... Who needs a seat at that table?
- Co-established norms/Agreements
- Establishing a meeting agenda and structure
- Communication Norms
 - When to use what type of communication
 - Parameters around the timing of communication

Need help developing a team? (and any of the above as needed)

- Training on Emotional Intelligence
 - Self-Awareness
 - Triggers
 - Personal Core-Values
 - Self-Management
 - Interpersonal and Team Awareness
 - Compass Navigation/Myers-Briggs
 - Interpersonal and Team Management
 - Responsible Decision Making
- Training and reflection on listening styles
- Retreats

Need help with cross-team collaboration?

- Project and Program Management that highlights opportunities for collaboration
- Delegating
- Leading departmental collaboration

Need help with effective decision-making?

- RAPID or RACI Structure
- Clear Decision-making protocols (and when to use each one)
 - Consensus, Democratic, Consultative, Executive, etc
- Training and reflection on disagreement

Need help with communicating decisions?

- Transparent and proactive waterfall communication
- Communicate “seven times and in seven ways”

GROWTH

Did everyone do something today to be better than yesterday, individually and collectively?

Mantra(s):

- Progress over perfection
- You have to climb steep slopes to reach the high points.

The Zones:

#1 “Competition Reality Show”	#2 “Assembly Line”	#3 “Auditions”	#4 “Workshop”	#5 “Thriving Ecosystem”
The Fear & Blame Zone	The Compliance Zone	The Limited Safety & Feedback Zone	The Safe Learning Zone	The Empowerment & Mutual Support Zone
Fear and blame dominate. Everyone is focused on personal survival — more concerned with avoiding failure or public critique than with growth. Collaboration is low, risk-taking is unsafe, and trust is fragile.	Compliance-driven culture. People focus on doing their defined tasks correctly, but creativity, initiative, and curiosity are suppressed. Growth is procedural, not developmental.	Feedback exists, but it feels evaluative and selective. People cautiously perform, hoping to “make the cut.” Risk-taking is limited, and growth is tentative — vulnerability is not yet normalized.	Safe space for learning and experimentation. Mistakes are embraced as learning opportunities, and feedback is constructive and mutual. Psychological safety supports authentic individual and collective growth.	A thriving, interconnected culture where growth is mutual, constant, and purpose-driven. Individuals contribute to each other’s learning and the organization’s growth, actively nourishing and modeling growth for its stakeholders and community. Continuous improvement is embedded in daily work — not an event, but a way of being.
What you’d see, hear, or experience				
<ul style="list-style-type: none">• Staff avoid taking risks or trying new approaches• Mistakes are hidden, not discussed• Leaders or peers publicly assign blame• Professional development is seen	<ul style="list-style-type: none">• Staff complete tasks as assigned, but do not reflect on improving them• Learning conversations focus on compliance with requirements• Feedback is generic or checkbox-driven	<ul style="list-style-type: none">• Feedback is mostly top-down and evaluative• Staff seek permission to innovate• Some staff openly reflect on growth, others are hesitant• Safe risks are rare in team discussions	<ul style="list-style-type: none">• Staff openly share learning goals and needs• Peer feedback is visible in team practices• Mistakes and learning moments are discussed in meetings	<ul style="list-style-type: none">• Staff describe recent personal and team growth• Teams coach and support each other to improve• Staff take initiative to lead learning across the organization• Innovation is shared

as performative • Leaders ask things like “Whose fault is it?” as an initial reflection	• Professional growth is viewed as separate from core work		• Teams celebrate growth and adaptation	and celebrated publicly
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How to move up through the zones? – Tools, Skills, and Resources:

Need help establishing a growth culture?

(Ultimately, when done well, all the tools for growing reinforce a culture of growth)

- Language Matters
 - Adding... yet.
- Praise Progress
 - Values-Aligned rituals and recognitions that focus on and celebrate growth and learning from failures
 - Leveraging a praise tracker to ensure you’re being structured and intentional with recognition
- Structures for reflecting and learning from each project/program
- Values-aligned and Transparent Evaluation System
 - That includes a Self-Reflection

Need help facilitating growth?

- Set targets and measure growth
(Should flow from strategic and priority planning)
 - KPI and Data analysis
 - Structures to keep data consistently part of conversations and managerial check-ins
- Transformational Coaching
 - Coaching beyond behaviors, coaching beliefs and ways of being
- Progressive support that pairs with progressive accountability as part of a performance management system
 - Akin to an MTSS
- A strengths-based approach, not a deficit-based approach
- Trauma-Informed Practices
 - Teaching and understanding triggers
 - Fight, Flight, Freeze, and Fawn response
- Adaptive Leadership
 - Addressing adaptive challenges by shifting habits, loyalties, priorities, and/or beliefs

Self(Team)–Reflection



1. Review and use the [Essential Question](#), [Zone descriptions](#), and [What you'd see, hear, or experience](#) sections for each dimension.
2. Reflect honestly: *Where are we today?* → *Which Zone best describes our current culture? Which behaviors or practices place us in this Zone?*
3. Use the [How to move up through the zones? Tools, Skills, and Resources](#) to identify what leadership moves could help us move to the next Zone.
4. Set concrete leadership goals based on your reflections

VISION Can all team members describe how their role aligns with the organization's mission and strategy?

Current Zone	
What evidence supports this?	
What would moving to the next zone look like?	

TRUST & BELONGING Can everyone bring their full, authentic self to all their work and workplace interactions?

Current Zone	
What evidence supports this?	
What would moving to the next zone look like?	

COLLABORATION Do decisions reflect the input of those impacted and show evidence of shared ownership?

Current Zone	
What evidence supports this?	
What would moving to the next zone look like?	

GROWTH Did everyone do something today to be better than yesterday, individually and collectively?

Current Zone	
What evidence supports this?	
What would moving to the next zone look like?	

Leadership Culture Survey



Self-reflection is invaluable and irreplaceable for growth. At the same time, no amount of self-reflection can fully capture what all members of your organization are thinking and feeling. Enter this research-aligned set of questions that can be used to capture a more complete picture of your organizational culture and health. They are meant to be answered on a Likert scale and can be supplemented with additional solicitation of examples, support, and other general feedback. It should also serve as a tool to goal set and progress monitor.

VISION

I can clearly state our organization's mission and the unique ways we work to accomplish it.

I have clear objectives and know what is expected of me at work.

My organization's mission and/or purpose make me feel my work is important.

TRUST

At work, I have the opportunity to do what I do best every day.

My supervisor cares about me as a person.

I feel like I can show up to work as my whole authentic self.

At work, my opinions seem to count.

I feel in the loop on decisions and updates that impact our organization

COLLABORATION

I know who makes decisions about what and how they are made.

My colleagues are committed to doing quality work.

I feel that I can contribute ideas and take risks in my work without fear of judgment.

We have effective procedures and structures to guide our team's functioning.

GROWTH

This year, I have had opportunities at work to learn and grow.

In the last six months, my supervisor has talked to me about my progress.

In the last 7 days, I have received meaningful feedback.

In the last 7 days, I have received recognition or praise for doing good work.

My manager encourages my development.

OVERALL

I have the materials and equipment I need to do my work effectively.

How likely are you to recommend our organization to a friend or former colleague as a great place to work?