

CHAMPS/NWRPCA Fall 2010  
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**ISFS**  
 Institute for Socio-Financial Studies

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**Creating High Morale Through  
 Values-Focused Leadership  
 Morning Session**

### What We Do...

- ISFS assists leaders in business, academia, and the public sector understand:
  - What people prioritize in their lives and why.
  - How they can reduce workplaces stresses and make better decisions.
  - How they can help themselves, their staff members, and their customers navigate today's difficult challenges and marketplaces more successfully.

### What We Do...

- Since its inception in 1991, ISFS research has had a far-reaching impact.
- ISFS research and education has been in the areas of healthcare, housing, financial literacy, and financial gerontology.
- The results of ISFS research have been presented in the US, Canada, Europe, Japan, and China, and have been translated into several languages.

### Research Behind LifeValues Leadership

1. Research across the decision making sciences.
2. Studies of human well-being, preference and choice, satisfaction and happiness.
3. Research about what matters most to individuals and their families.
4. How the social and cultural environments influence human behaviors.

### Today's Sessions...

1. **Morning:** Understand your own leadership style, how you developed it and why.
2. **Morning:** Know your values and how you make decisions. Put LifeValues Principles into practice with staff members.  
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1. **Afternoon:** Understand the social and cultural environments that surround us.
2. **Afternoon:** Know your customers' and what *they care about most*. Inspire your employees and customers and *increase the bottom line at the same time!*

### Shifting Responsibility

Workplace trends, health care, and retirement models:

1. Are all becoming less certain,
2. They require both leaders and consumers to make more difficult personal choices, and
3. Require more "personal responsibility" for favorable outcomes.

## In Fact...

Most of us *like* feeling responsible when we:

1. Know what is expected of us.
2. Believe we actually can achieve what we are undertaking.
3. Have the *tools we need* to be successful.
4. Are fully invested in the outcome.

## Tools Leaders Need

1. Understand LifeValues Principles.
2. Know what staff as well as customers really care about.
3. Have a keen awareness of societal trends.
4. A LifeValues Plan for achieving outstanding customer and staff relations.

## Principle No. 1...

- **Your leadership style and decision-making are about all of your life.**

## Principle No. 2...

- **Your family history influences your leadership style and staff relationships today.**

## Principle No. 3...

- **Your LifeValues drive all of your important decisions, consciously or unconsciously.**

## Principle No. 4...

- **You can consciously use your LifeValue system to make better choices and decisions.**

## Principle No. 5...

- **Your LifeValues system will live as long as you do.**

## Exercise...

Your Unique LifeValues History  
**Break**

## Your LifeValues System

All LifeValues are *Subjective* and consist of what we think and feel about these dimensions of our lives.

- Inner/Personal
- Physical/Tangible
- Social/Societal
- Financial/Economic

## Inner Values ...

- Safety and Security
- Autonomy and Control
- Identity and Social Identity
- Feelings of Spiritual Connectedness

## Social Values...

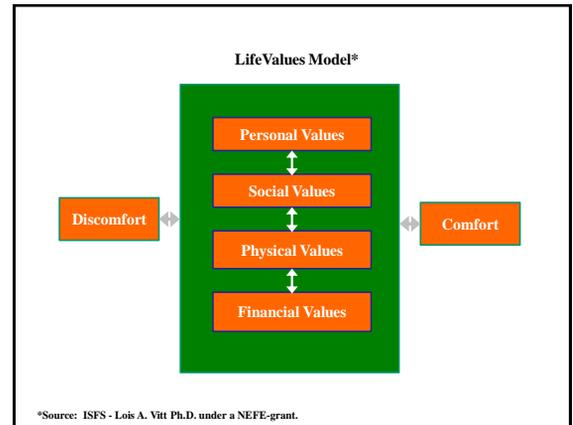
- Family and Friends
- Communities of Interest
  - Employer and Co-workers
  - Other Peer Groups
  - Neighbors
  - Cultural associations

## Physical Values...

1. Internal
  - *Health*
2. External
  - *Material*
  - *Environmental*

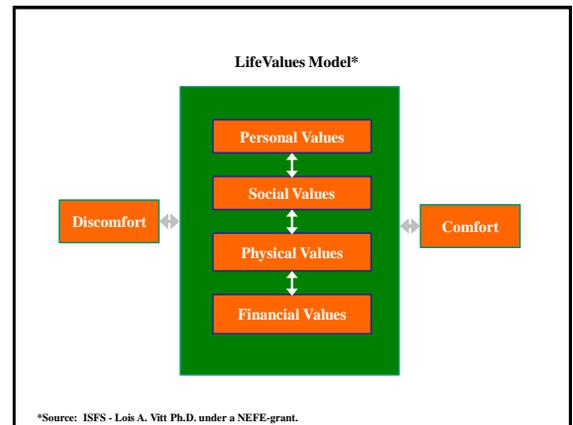
## Financial Values...

- Sufficiency
- Sustainability
- Appropriateness



## Exercise...

Exercise....  
Your LifeValues Profile Quiz:  
BREAK



## Points to Ponder

- You cannot “negotiate away” your values. You must accommodate them.
- You cannot “negotiate away” another person’s values either. Think about how they were formed and instead try to put yourself in their place.
- You must find a decision solution that accommodates your values as well as those of your staff members and employees.
- Too difficult? Stay tuned...