

Excerpted Message from Davis H. Taylor to Karen B. Peetz

Subject: TAI - an approach to culture change

Karen-

Thank you for reaching out to us about your interest in initiating culture change at Penn State. We very much appreciate your confidence in TAI.

TAI's approach is based on the belief that values form the basis for behavior—if we want to achieve a specific performance, we must select the right values. And if we want to change culture, we must begin by articulating and modeling the specific behaviors and values that would create that change.

While transforming an organization to deliver predictable and sustainable results may be relatively simple, it never is easy. Cultural change must be intentional and carefully orchestrated. It begins by leadership articulating, aligning-on and modeling the values-based behaviors necessary to produce desired and expected performance. Culture begins at the top of the house. *How* the leaders behave is emulated by those below. That behavior literally becomes the culture—*the way we do things around here*.

A Pennsylvania company, TAI would be honored to assist you in this endeavor at Penn State. I trust the following captures well your interest and intent. Resulting from our conversations, an effective approach may be:

1. Interview the Trustees in order to: a) involve Trustees in the process to establish ownership in the outcome; b) understand core, or perhaps latent issues around the topic; c) set the stage for a successful work session; d) lay the groundwork to launch a leadership culture change at the university.
2. Create a summary report of interview findings; meet with you and those you designate to review key findings and themes highlighted in the report.
3. Conduct a work session with the Board to review interview findings, to identify the kind of culture needed—what stays and what has to go—and to articulate specific behaviors expected to be lived-out in the new culture.
4. During the session, secure alignment and confirm agreement on required behaviors.
5. Conclude the session with an actionable list of leadership behaviors and specific next steps.

While we will collaborate with you to determine specific questions to be asked, the interviews might include:

- *How would you describe the current leadership culture at Penn State?*
- *Does a cultural change need to take place there? Why or why not?*
- *What role can/should the Board of Trustees have regarding the leadership culture at Penn State?*
- *If it were up to you what behaviors would you mandate as part of a new culture?*
- *To what degree can you, and are you willing, to ensure a cultural change takes place?*

Karen, as you are aware, TAI brings a VBL message. Values-based Leadership is the philosophy and life platform that predictably and consistently develops thriving individuals, creates effective leaders, promotes high performing teams and establishes extraordinary organizations. VBL is about leaders aligning with and *living-out* both personal and corporate values on a daily basis while focusing on creating value for the sake and benefit of others—not just themselves—and delivering exceptional value for all constituencies.

Thanks to your sponsorship, the VBL message was delivered to over 6,000 leaders and managers at BNY Mellon, through executive coaching, team alignment initiatives and workshops. Two quotes we received from BNY Mellon leaders seemed pertinent to the point at hand:

"Values based behavior and leadership is clearly the better alternative to organizational development. It is the most rapid method to transform an organization in a sustainable way. One can argue that values based behavior is the only way that an organization can achieve longevity and relevance. Changing embedded culture is not an easy task. However, in order for the change to be sustainable it must be demonstrated at all levels of an organization."

"I think VBL is an excellent method for creating a culture that we need. Although we have been successful with our mergers from a business standpoint, the cultures of the various acquired institutions clashed. VBL provides a platform for all."

Also it may be helpful to know that TAI is delivering the VBL message and methodology to executive teams at several businesses within Merck, and we created and facilitated VBL-based leadership development initiatives for university staff at Notre Dame and Regent University.

Again, thank you for the confidence you place in us. We would value this opportunity to be of service.

Warmest regards,
Davis

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