Adaptive Leadership
MFS Strengthening Resilience

September 30\textsuperscript{th}, October 1\textsuperscript{st} & 2\textsuperscript{nd}, 2015, Cornwall, Ontario

Facilitated by

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Invigorate Your Team, Invigorate Your Organization!

What Kind of Leadership do you wish to Demonstrate?

- Consider the qualities or characteristics you admire in people demonstrating leadership?
- Record the qualities or characteristics you wish to be remembered for (on the blue card found in the left pocket of your participant portfolio).
- What are your core values that drive your leadership? (Record these on the 2\textsuperscript{nd} blue card)
Five Assumptions About Leadership

R. Heifetz

1. Leadership is about mobilizing others to face their most difficult challenges;
2. Leadership is an activity;
3. Leadership can be exercised from any position – it does not require authority;
4. Opportunities present themselves for us to exercise leadership everyday;
5. Leadership is difficult and at times risky.

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Can Leadership be “Taught”?

Ron Heiftz:
Genetics
Art and Science
Failure
What is the problem/gap?
What is needed (adaptation)?
What skills and characteristics are required to lead through that?
Creating Learning Opportunities

Approach:

- Case-in-point – deep learning in the here and now versus talking about it. Roles we are playing, how we work together, assumptions we are making
  - Tips: Listen and participate, Be respectful, purposeful and authentic, be open to multiple interpretations, respect confidentiality, “play” with new approaches!
- Case Study – analyzing real-life leadership challenges
  - Tips: Focus on the leadership dilemma, don’t be the expert, engage with others (not just the facilitator), offer ideas and interpretations

Technical versus Adaptive Challenges

<table>
<thead>
<tr>
<th>Kind of Challenge</th>
<th>Challenge and Solution Definition</th>
<th>Whose work is it?</th>
<th>Type of Challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>Clear</td>
<td>Authority</td>
<td>Optimize Execution</td>
</tr>
<tr>
<td>Technical and Adaptive</td>
<td>Requires Learning</td>
<td>Stakeholders</td>
<td>Experiments and Small Risks</td>
</tr>
<tr>
<td>Adaptive</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Technical versus Adaptive Examples

<table>
<thead>
<tr>
<th>Challenge Examples</th>
<th>Does everyone agree to the solution?</th>
<th>Can experts fix this alone?</th>
<th>Can this work be done quickly and efficiently?</th>
<th>Adaptive or Technical?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broken Arm</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>technical</td>
</tr>
<tr>
<td>Supporting individuals with PTSD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting support for increasing spaces in daycare</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Supporting ill/injured veterans</td>
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Invigorate Your Team, Invigorate Your Organization!

Peer Consulting

- **Case Presenter** – Present facts, respond to data gathering questions, go to the balcony, reflect on the peer consultation
- **Facilitator** – Engage others, manage the process including time boundaries
- **Note Taker** – Capture the key points to provide for the case presenter to take away

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Diagnosis/Interpretation

<table>
<thead>
<tr>
<th>Technical</th>
<th>Adaptive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>Systemic</td>
</tr>
<tr>
<td>Consensual</td>
<td>Conflictual</td>
</tr>
</tbody>
</table>

Lack of clarity on what the Adaptive Challenge is (Diagnosis)

Case Presenter does not remain silent, dominates the conversation, defends actions

Peer Consultants jump too quickly to solutions, especially technical solutions.

Peer Consultants hold back (e.g. avoid sharing difficult news) to Case Presenter

Case Presenter does not openly share real stakes, anxieties.

Peer Consultants offer insights from their own experience/expertise, rather than seeing the problem through the eyes of the Case Presenter and other stakeholders.
Leadership Levels and Associated Tasks

Adaptive Leadership, Relational Dialogue
Social Leadership

Leadership Level III

Inter-Personal Influence
Relationship-Based Leadership

Leadership Level II

Personal Dominance
Leader-Based Leadership

Leadership Level I

Organizational Learning

Adaptive Leadership
- Facing adaptive challenge, creating meaning
- Innovation, change, dealing with paradigm shifts
- Holistically framing issues, creating context for dialogue, managing creative conflict and tension
- Stimulating/consolidating organizational learning

Personal Dominance
- Setting direction, priorities, mission, vision, goals, purpose and taking immediate action
- Creating commitment, alignment, motivation, spirit, teamwork, and political skill

The KLC Competency Framework

<table>
<thead>
<tr>
<th>Diagnose Situation</th>
<th>Manage Self</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical versus Adaptive</td>
<td>Know your strengths, vulnerabilities, triggers</td>
</tr>
<tr>
<td>Understand process challenges</td>
<td>Know the story others tell about you</td>
</tr>
<tr>
<td>Test multiple interpretations, Points of view</td>
<td>Choose amongst your competing values</td>
</tr>
<tr>
<td>Take the temperature</td>
<td>Get comfortable with uncertainty and conflict</td>
</tr>
<tr>
<td>Identify who needs to do the work</td>
<td>Experiment beyond your comfort zone</td>
</tr>
<tr>
<td></td>
<td>Take care of yourself</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Energize Others</th>
<th>Intervene Skillfully</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engage unusual voices</td>
<td>Make conscious choices</td>
</tr>
<tr>
<td>Work across factions</td>
<td>Raise the heat</td>
</tr>
<tr>
<td>Start where they are</td>
<td>Give the work back</td>
</tr>
<tr>
<td>Address loss</td>
<td>Hold to purpose</td>
</tr>
<tr>
<td>Inspire a shared purpose</td>
<td>Speak from the heart</td>
</tr>
<tr>
<td>Create a trustworthy process</td>
<td>Act experimentally</td>
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Invigorate Your Team, Invigorate Your Organization!
Immunity to Change

Kegan and Lahey

• “You must change your lifestyle or die”. How many people out of change make the change?
• Desire and motivation are not enough!
• Our individual beliefs and our collective mind sets combine to create a natural but powerful immunity to change
• How do you overcome it and unleash your potential?

Unconsciously Immune

Consciously Immune

Consciously Released

Unconsciously Released
Socialized mind
- Team Player
- Faithful Follower
- Aligning
- Seeks Direction
- Reliant

Self-authoring Mind
- Agenda driving
- Leaders learns to lead
- Own compass, own frame
- Problem-solving
- Independent

Self-transforming mind
- Meta-leader
- Leader leads to learn
- Multi-frames, Holds contradictions
- Problem-finding
- Interdependent

Adaptive Learning
- Too hot!
- Adaptive challenge
- Limit of tolerance
- Productive distress
- Threshold of learning
- Work avoidance
- Technical problem
- Time
"The dangers of exercising leadership derive from the nature of the problems for which leadership is necessary. Adaptive change stimulates resistance— it challenges people’s habits, beliefs, and values. It asks them to take a loss, experience uncertainty, and even express disloyalty to people and cultures... loss, disloyalty, feeling incompetent... No wonder people resist."

The Dangers Adaptive Leaders Face

- Marginalization
- Diversion
- Attack
- Seduction
- Loss
Embrace Disequilibrium
Source: Heifetz & Linsky

1. Keep your Hand on the Thermostat
2. Depersonalize Conflict
3. Create a Culture of Courageous Conversations

Six Key Relationships
M. Linsky

- Allies
- Opposition
- Senior Authorities
- Casualties
- Trouble-makers
- Self
Focused on Results
Accountable
Commitment
Willingness to Engage in Conflict
Trust

High Performing Teams
Adapted from Five Dysfunctions of a Team, P. Lencioni

Ladder of Inference
Chris Argyris

- I take actions based on my beliefs
- I adopt beliefs or reinforce
- I draw conclusions
- My assumption evokes a feeling
- I make assumptions - added meanings
- I add meanings - personal & cultural
- I select data from what I observe
- I observe experiences
Unquestioned Assumptions

• Our beliefs are the truth
• The truth is obvious
• Our beliefs are based on real data
• The data we select is the real data

Rationale for Checking it Out

• Gives you the opportunity to clarify what is being said/inferred.
• Individuals will feel understood and heard by you.
• Will enable the focus of communication to remain on track.
Tips for Courageous Conversations

- Be prepared and be specific
- Be fully present
- Be authentic
- Address the behaviour; avoid criticising the person...
  - You have failed at this task versus you are a failure

Tips for Courageous Conversations

- Make it Safe
- Avoid taking things personally and getting defensive
- Listen!
- Be aware what you are communicating without words
- Be empathetic and be firm
- Clarify understanding and get a commitment
- Follow-up & follow through
Preparing for Courageous Conversations

Purpose of the Conversation

What are your goals for the discussion?
- To provide feedback/address a concern?
- To gain commitment for action?
- To explore development goals?
- Other?

Employee Perspective

- What specifically would you like to know about this individual’s situation, goals, aspirations, motivations, challenges?
- Is the person unaware, unable, and/or unmotivated?
- What assumptions do you have, if any, that are worth testing?
Preparing for Courageous Conversations

Common ground/Common goals/Context

- What are the departmental/organizational goals and initiatives to which this individual contributes?
- What are the specific challenges that might be impacting this person?
- What are the quality, safety, policy, regulatory considerations?

Preparing for Courageous Conversations

Strengths to Leverage

- What are the ways in which this individual brings value to your organization (personal approach, accomplishments, knowledge, skills, professional relationships, experience)?
- How has this individual contributed to the goals, strategy and objectives of the organization/department? Some examples of success?
- How could this individual be supported to be successful and/or make a greater contribution?
- What skills, talent, and expertise can be more fully utilized?
Pros and Cons of Scripting

**Scripts are GOOD when ...**
- used as starting point - a framework for discussion about
- you find your own voice in them

**Scripts are BAD when ...**
- overly memorized and rehearsed
- you say the "right thing" even if you are not fully supportive or comfortable with those words
- you are or you sound insincere
- used as crutch

...and Another Thing About Scripting

- Scripts are GOOD when ... they are not “cookie cutter”; they allow for a 2-way conversation....
- The human brain can really only hold on to four things at a time
- Say one or two sentences
- Pause or let them speak

*Source: Andrew Newberg, Words Can Change Your Brain: 12 Conversation Strategies to Build Trust, Resolve Conflict, and Increase Intimacy*
Courageous Conversation Preparation

Clarify Your Intention in Writing

• What do I want for the Military Families we serve?
• What do I want for myself in this conversation?
• What do I want for the other person?
• What do I want for our working relationship?

*From MSNS Managing Conflict During Times of Change: The Leadership Challenge Resource Guide

Courageous Conversation Planning

Safety

► What is the best time for this conversation to occur?
► What is the best location for the conversation?
► Who should be included in the discussion?
► What else will I do to foster a sense of safety?
The Courageous Conversation
Part 2

- Describe the Behaviour
- Provide Recent Examples
- Discuss Impact/Consequences
- Lay out Expectations
- Alternative Behaviours
- Gain Commitment
- Follow Up/Follow Through

Intention/Impact

- "I trust you had good intention when you ______; however, there was an unintended impact: _________."

- "In the future, it would be (important/helpful...) to _____ ” or “I request that you/I expect you______.”

*Adapted from MSNS Managing Conflict During Times of Change: The Leadership Challenge Resource Guide*
Facts First

- Start with what you saw and heard.
- Share your story.
- End with a question.

*From MSNS Managing Conflict During Times of Change: The Leadership Challenge Resource Guide

Restoring Safety

- Apologize
- Use Contrasting
  - I don’t want you to think...
  - I do want you to understand...

*From MSNS Managing Conflict During Times of Change: The Leadership Challenge Resource Guide
Confront Indirectly

Focus on the rules and perceptions of those external to them and external to your relationship with them as reasons to act differently in the future.

- “Our policy requires…”
- “Professional practice standards require….”
- “Legally, we have an obligation to…”
- “People would appreciate it if you were to…”

*Adapted from MSNS Managing Conflict During Times of Change: The Leadership Challenge Resource Guide

Moving Forward

- Practice in low-risk situations before using new skills with the most challenging situations.
- Scripts are just to get you started; adopt your own language.
- Utilize mentors and trusted colleagues as a sounding board and to provide meaningful feedback.
Adaptive Leadership Strategy: Getting on the Balcony

- Gain a holistic perspective
- Systems thinking
- Technical vs. Adaptive Work
- Simultaneously on the dance floor and above it on the balcony
- Observe patterns and people
- Discern true meanings and feelings, particularly of authority figures; “song beneath the words”
- Personal reflection

Adaptive Leadership Strategy: Thinking Politically

- Dance the relationship dance
- Encourage supporters
- Stay close to opponents
- Court the undecided
- Acknowledge the loss—uncertainty, disloyalty, and incompetence change brings
- Allow time for transition but leave behind those that cannot make the change
Adaptive Leadership Strategy: Orchestrating the Process

- Establish safe, stress-ful holding environment
- Moderate temperature to pace work progress
- Let issues ripen when needed
- Balance pain of loss with positive possibility of change for their future
- Give the work back to the people
- Make interventions short and simple
- Don’t take personal attacks personally

Adaptive Leadership Strategy: Hold Steady!

- Take the heat
- Patiently let issues ripen
- Focus attention on the issues
- Ask lots of real tough questions
- Suspend your reality
- Encourage risk and experimentation

M. Linsky & R. Heifetz
Adaptive Leadership Strategy: Manage Your Hungers

- Recognize the potential need for power, control, affirmation and importance
- Social Connection and happiness needs must be met appropriately
- Manage your grandiosity remembering people see you more in your role than as a human person (diverse interests, work life balance is important)
- Use transitional rituals to demarcate your roles

Adaptive Leadership Strategy: Anchor Yourself

- Don’t confuse one’s self with one’s professional role
- Identify a truly trustworthy confidant who can really tell you what you need to hear
- Do not use allies as confidants
- Find a sanctuary for retreat, rejuvenation, and personal reflection
- Put yourself on the line in leading again!
Adaptive Leadership Strategy: Maintain a Sacred Heart

M. Linsky & R. Heifetz

Quality of Heart | Becomes | Dressed Up As:
--- | --- | ---
Innocence | Cynicism | Realism
Curiosity | Arrogance | Authoritative Knowledge
Compassion | Callousness | The “thick skin” of experience

Call to Action: Adaptive Leadership

M. Linsky & R. Heifetz

- Discern Adaptive vs Technical Challenges
- Identify the Adaptive Challenge
- Focus and Discipline on Effective Diagnosis
- Share Responsibility
- Regulate Disequilibrium
- Infuse the Work with Meaning and Promise
- Teach a Culture of Adaptive Leadership
Sources

- *The Deep Blue Sea: Rethinking the Source of Leadership*, by Wilfred Drath, 2001
- *For the Common Good*, by Ed O'Malley, Julia Fabris McBride and Amy Nichols, 2014

Thank You!

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