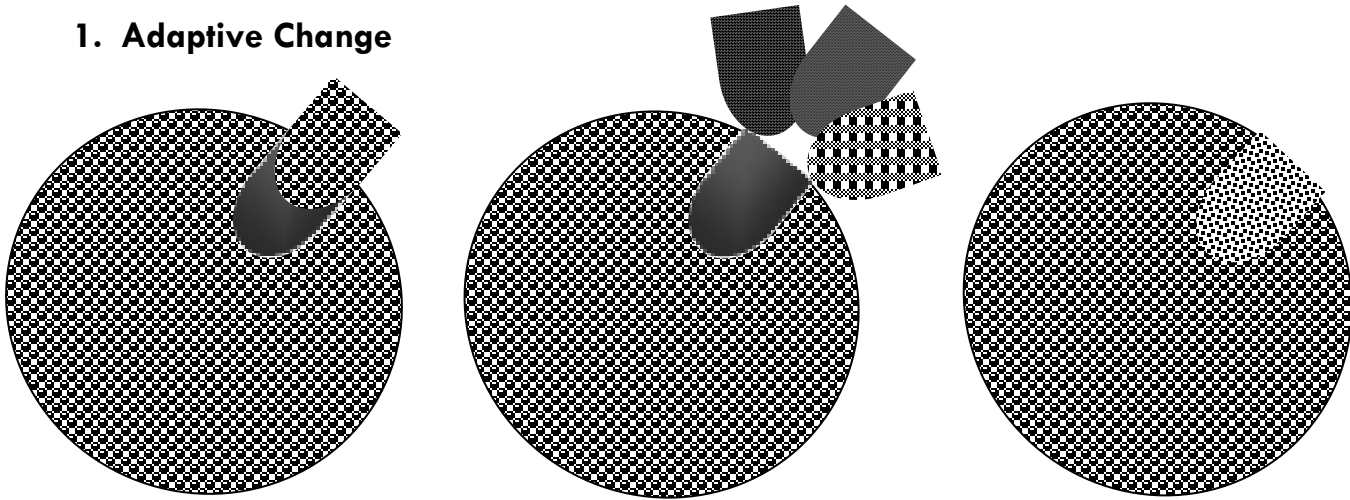


Adaptive Change and the Zone of Productive Disequilibrium

“Adaptive Leadership 202: A Learning Congregation Workshop,” Oct 5, 2013
 Clara Barton and Massachusetts Bay Districts, Unitarian Universalist Association
 Rev. John Gibb Millspaugh, Director of Congregational Development

1. Adaptive Change

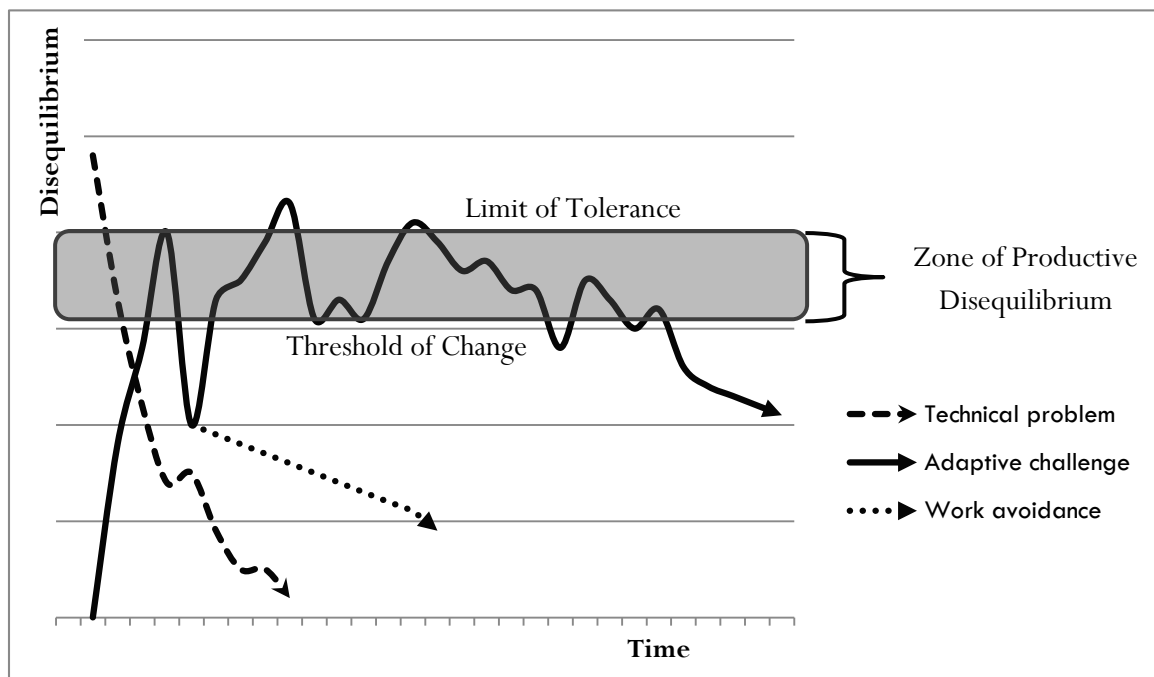


Most congregational/organizational DNA—including structures, norms, mission, values, self-concept, etc—is worth keeping, but some must be let go, to face the demands/potential of the new situation.

Adaptive organizations continually run low-cost, high-learning experiments, assuming some will fail, to find/build new DNA that will allow the congregation to thrive in the new context.

At the conclusion of an adaptive change process, new congregational DNA is integrated; the “unaffected” portions of the congregation adjust to accommodate.

2. The Zone of Productive Disequilibrium



Our Tough Leadership Challenge

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Select a significant, prolonged leadership challenge your congregation or organization needs to engage, or is currently stuck in, where an *effective* way forward is unclear. This is a challenge to keep in mind throughout the workshop.

One of my congregation’s toughest central challenges blocking our potential is:

This is an adaptive challenge because:

The work needed to address the challenge, in my opinion, might be:

The Players involved are:

- 1.
- 2.
- 3.
- 4.
- 5.

Others:

My Part of this Mess is:

Ways to Avoid Working on Adaptive Challenges

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Groups tend to prefer to avoid dealing with adaptive challenges, because overcoming adaptive challenges surfaces individual discomfort and confusion, produces group disequilibrium, and involves loss. Avoiding disequilibrium (and etc.) is usually a good thing, but when facing adaptive challenges, avoiding disequilibrium results in avoiding the work. Yet if groups fail to face their adaptive challenges, they cannot continue to flourish. Adaptive leaders identify “the work” of the adaptive challenge, deflect the group’s natural “disequilibrium avoidance” (or “work avoidance”), and continually refocus the group’s attention back on the work.

How can you counteract the group’s expected “avoidance mechanisms” to help yourself and others learn despite resistance? Recognizing common avoidance tactics can help you keep focus on the work. Often, avoidance mechanisms are easier to identify than the adaptive work being avoided. The timing and nature of the avoidance mechanism provides a clue to the work being avoided. What issue was surfacing or being discussed just *before* the avoidance behavior occurred?

Typical Avoidance Methods Used by Individuals, Groups, and Congregations

Divert attention:

- Define the problem to fit your current expertise.
- Use the fact that a good solution is unclear to take the discussion off the table.
- Even when discomfort is productive, turn down the heat to reduce it. For example: be caring and empathic, change the subject, tell a joke, take a break and do not return to the issue.
- Focus only on the technical parts of the problem, then apply only technical fixes. Continue to only apply technical fixes, old and new, whenever the challenge resurfaces. Repeat.
- Take options off the table, e.g., reject options conflicting with tradition/norms/assumed values.
- Create a proxy fight, like a personality conflict; heat up attention on a more easily managed issue.
- Reorganize.

Displace responsibility:

- Maintain a group norm like: “Don’t bring us a problem unless you have a solution.”
- Attack, smear, or marginalize the person raising the issue.
- Scapegoat. Pin the problem on someone not in the room, and disown your own piece of the mess.
- Externalize the enemy--the problem is an outside reality, not our need to change.
- Shift focus to authority figure and their failure to expertly fix the problem.
- Complain about individuals, factions and/or groups—their behaviors or their perspectives.
- Delegate adaptive work to those who can’t do much about it.

How to Recognize Work Avoidance Mechanisms When They Occur

- The subject at hand is suddenly taken off the table.
- The level of stress associated with a problem suddenly drops.
- The focus shifts from attending to the problem to alleviating the symptoms of stress.
- Responsibility is displaced.
- As Ronald Heifetz writes, “One ought to take a skeptical stance, at least momentarily, when some action suddenly makes everybody feel good.”

My Personal Best Avoidance Strategies

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1.

2.

3.

4.

5.

6.

7.

8.

Other Avoidance Strategies in the Congregation or Organization

1.

2.

3.

4.

Tasks of Adaptive Leadership

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SIX TASKS OF ADAPTIVE LEADERSHIP IN CONGREGATIONS AND THE FIELD

Task 1: Disaggregate the Adaptive Challenge(s) from the Technical Problems

Some questions that might help identify the Adaptive Challenge:

1. Where does the same challenge arise again and again, regardless of how much work is thrown at it?
2. What hidden issues and conflicts are not named aloud in public meetings?
3. What, at the lowest level of abstraction, is a common goal to which all relevant stakeholders could agree? What is the level of abstraction at which conflict emerges?
4. Might the adaptive challenge fit into one of these categories:
 - A. Maintenance: Defining and protecting what is most essential in the face of a gradual threat
 - B. Development: Cultivating capacities into new capabilities
 - C. Creativity: Developing new capacity to do something never done before by this system
 - D. Integrity: Reducing the gap or clash between stated values and real behavior
 - E. Crisis: Leading in the face of unexpected and sudden period of danger
 - F. Transition: Moving from one story, self-understanding, or value set into a new narrative

Task 2: Identify the Work being Avoided, and to Whom it Belongs

Sometimes, work avoidance mechanisms are easier to identify than the work being avoided. The timing and nature of work avoidance mechanism provides a clue to the work being avoided. What issue was surfacing or being discussed at the time?

Ways to recognize when work avoidance is occurring:

1. The subject at hand is suddenly taken off the table.
2. Level of stress associated with a challenge suddenly drops and everyone feels better, without any actual progress on the challenge.
3. Focus shifts from attending to the challenge to alleviating the symptoms of stress.
4. Responsibility is displaced.
5. As Ronald Heifetz writes, "One ought to take a skeptical stance, at least momentarily, when some action suddenly makes everybody feel good."

Some questions that might help identify the work:

1. What was being discussed just before the work avoidance occurred?
2. What is the work? (Answer as best as possible. Then set aside that answer and try again.)
3. What is each faction's view of the problem? Which faction needs to learn what?

Tasks of Adaptive Leadership, cont'd.

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Task 3: Think and Act Politically, Cultivate Responsibility

Every individual and group in the system acts the way they act to achieve success, as they understand success. Some questions that might help you help them:

1. What is the role of the authority figure?
2. What are the other stakeholders working to protect? What are they afraid of losing? To what loyalties are they beholden?
3. What is the hidden issue motivating their behavior? What motivation might I hesitate to ascribe, that might nonetheless be true?
4. How can I stop trying to convince others to care about what I care about, and instead start caring about what they care about?
5. How can I (and other stakeholders) genuinely take their loyalties into account in forwarding the work, even if those loyalties are not important to me personally?
6. How might they come to understand that more of their (real or perceived) needs will be met by doing the work than by not doing the work?

Task 4: Perhaps with an Ally, Diagnose Your Piece of the Mess

Some questions that might help identify with Internal/Personal Analysis:

1. In what ways am I confusing my role with myself?
2. In what ways have I perceived others as responding to me, when they are really responding to my role?
3. What default responses in my repertoire that have already been triggered? Which are likely to be triggered by upcoming group dynamics? What is my tuning? Who or what plucks my harp strings?
4. In what ways am I vulnerable to marginalization, diversion, attack, or seduction?
5. What narrative am I in? What are my operative loyalties and beliefs?
6. What losses do I have to face? Direct losses? Renegotiated loyalties? Losses of a sense of competency and expertise?
7. What are my anchors? Who are my confidantes? My allies?
8. What is my formal authority? What is my actual informal authority with each faction?
9. In what ways might my options increase if I:
 - a. Stopped confusing myself with my role?
 - b. Stopped allowing it to “get to” me when people are bothered by the my carrying out my role appropriately?
 - c. Compensated for my vulnerabilities (see #4)?
 - d. Evolved my story, my loyalties, or my beliefs?

Tasks of Adaptive Leadership, cont'd.

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Task 5: Create a Holding Environment and Regulate the Temperature

Think of the holding environment as a pressure cooker with strong walls allowing the ingredients to interact, and with a release valve to regulate heat to ensure productive disequilibrium.

Unitarian Universalists have a variety of cultural tools for creating holding environments (in worship, covenant groups, listening circles, informal gatherings, coordinating councils...not to mention coffee hour. We discuss some in detail in this seminar. When you use holding environments to do the ministry of adaptive leadership, keep these tasks in mind:

1. Let go of the default tendency to turn down the heat. Instead, use the real and potential heat available to focus attention on the work.
2. Hold attention on the hard stuff. Keep the attention on the nature of the adaptive challenge, and the gap between where the group is and where it needs to be in order to flourish in the new context.
3. Regulate the temperature. Put pressure on people who need to do the work.
4. Orchestrate conflict. A longer way of saying that: Put people into meaningful dialogue with one another, and give them what they need to hold courageous conversations while maintaining both integrity and relationship.
5. Make short, simple interventions (observations, questions, interpretations, actions), then be quiet.
6. Help the group learn to tolerate disequilibrium and focus on issues rather than people.
7. Continually give the work back to the people. They will thank you for it! Just kidding.

Task 5: Dance on the Edge of your Authority, but Take Care to Stay Alive

Exceed your authority. A system will not authorize its authority figures to lead them in doing adaptive work, because the system, at least in the beginning, wants to avoid adaptive work. Therefore, to lead adaptive work, you must exceed your formal authority.

Because adaptive leadership is so meaningful, this is dangerous work. Work with allies and confidantes to monitor the distress of the system over time, to avoid having your work, or your role, neutralized.

Visit your personal sanctuaries regularly. Care for your body, mind, and spirit, to recall yourself to the sacred. Adaptive leadership is tough work, and without such spiritual refreshment, you may burn out, or lose sight of the work, or forget why success on this adaptive challenge matters so much to you, and those who will come after you.

Additional Resources

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The following works might be of interest for those wanting to deepen their understanding of leading congregational change and transition.

Edwin Friedman, *A Failure of Nerve: Leadership in the Age of the Quick Fix*. Seabury Books, 2007.

Posthumously published essays on leadership. Friedman is well known by many clergy; this is his best work an ever about “systems theory” and the role of anxiety in congregations.

Ronald Heifetz, Alexander Grashow, Marty Linsky. *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World*. Harvard Business Press, 2009. The best published resource on Adaptive Leadership, hands down.

Robert Kegan & Lisa Laskow Lahey, *How the Way We Talk Can Change the Way We Work: Seven Languages for Transformation*. Jossey-Bass, 2002. The best explication of coming to terms with our own “immunity to change.” Provides an excellent individual assessment process as well as organizational.

C Otto Scharmer, *Theory U: Leading from the Future as It Emerges*. Berrett Koehler, 2009. An MIT professor takes adaptive leadership in a more explicitly (and accessibly) spiritual direction.

Peter M. Senge, C. Otto Scharmer, Joseph Jaworski, Betty Sue Flowers, *Presence: An Exploration of Profound Change in People, Organizations, and Society*. Broadway Business, 2005.

Dean Williams, *Real Leadership: Helping People and Organizations Face Their Toughest Challenges*. Berrett Koehler, 2005. A colleague of Heifetz – particularizes the work with more examples and details about six types of adaptive challenges.

Jane Magruder Watkins and Bernard J Mohr, *Appreciative Inquiry: Change at the Speed of Imagination*. Jossey--Bass, 2001.

Mark Lau Branson, *Memories, Hopes and Conversations: Appreciative Inquiry and Congregational Change*. Alban, 2004.

William Ury, *The Power of the Positive No*. Bantam, 2007.

Robert Latham, *Moving On From Church Folly Lane: The Pastoral to Program Shift*. Wheatmark, 2006.

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