

WHAT IS ADAPTIVE LEADERSHIP?

Adaptive Leadership is a practical leadership framework developed by Ron Heifetz and Marty Linsky at the Harvard Kennedy School. Through a process of confronting the status quo and identifying technical and adaptive challenges, the framework helps individuals and organizations navigate consequential change.

PRE-WORK OBJECTIVES

- Get an overview of Adaptive Leadership to lay the foundation prior to the session
- Articulate your purpose and motivations for doing this fellowship
- Understand the difference between technical vs. adaptive challenges
- Define an Adaptive Leadership challenge you are currently facing that will help to inform your project

PART 1: DO THE READING

FIRST, READ THIS (link):
'Leadership in a Permanent Crisis

ESTIMATED TIME: 1 hour
PAGES: All

PART 2: COMPLETE THIS PACKET

NEXT, COMPLETE THIS PACKET ON YOUR OWN
before getting together with your partner.

ESTIMATED TIME: 1-2 hours
PAGES: 2-8 (of this document)

PART 3: PARTNER DISCUSSION

THEN, GET TOGETHER WITH YOUR PARTNER (meeting or a call) to discuss

ESTIMATED TIME: 30-60 minutes
PAGE: 9 (of this document)

PART 4: MEET WITH YOUR SPONSOR

TALK TO YOUR SPONSOR, the CEO or leader who is sponsoring your fellowship.

ESTIMATED TIME: 30-60 minutes
PAGE: 10 (of this document)

PART 5: SUBMIT YOUR CHALLENGE

FINALLY: SUBMIT YOUR CHALLENGE ONLINE HERE (link).

PASSWORD: Adapt4AEH



PART 1: DO THE READING

READ & REFLECT

READ: 'Leadership in a Permanent Crisis'

As you read, think about:

- What are some of the most adaptive organizations, communities or people you have seen or read about? In your view, what makes them adaptive?
- What types of resistance to change have you seen in yourself or in others? Why do you think that people want to maintain the status quo?
- Think of when you experienced a change initiative in your past. What pain, distress or conflict did you witness or experience during the change process? Do you have a high or low limit of tolerance? How do you know when you have reached your limit? What work avoidance techniques or patterns have you seen within your organization?

PART 2: COMPLETE THIS PACKET

TECHNICAL VS. ADAPTIVE CHALLENGES

When mobilizing for change, one of the most important initial leadership activities is understanding and differentiating between the technical and adaptive elements of the challenge. The way that people see the problem is often the biggest part of the problem. People generally begin with a technical version of their problem. We will guide you to understand the technical and adaptive distinction and begin to look at challenges more adaptively.

TECHNICAL PROBLEMS

How do you know if a problem is technical?

- It's easy to recognize
- You know how to solve it
- There's a clear problem and clear solution
- An expert or authority can complete or delegate the task, and make progress
- It can be solved with facts, information, knowledge and subject matter expertise

Example: Consider a broken arm. The problem is very clear: a broken arm must be mended. While we might not be able to set and cast the arm ourselves, we know who to call – a doctor – to have the problem solved. The work, then, is in setting and casting the arm as efficiently and comfortably as possible.



ADAPTIVE CHALLENGES

How do you know if you're facing an adaptive challenge?

- It's not clearly defined
- You don't have all the information you need or a process to find that information
- You feel it in your "heart and gut" as well as your mind
- It challenges deeply held behaviors, practices and ways of working
- Stakeholders involved need to be engaged and brought along
- It requires learning and risk-taking

Example: Now consider older adults. Many of us have grandparents or parents who have reached an age where it is potentially unsafe for them to continue driving. The problem is not as simple, or technical, as to just take away their car keys. Instead, it requires courageous conversations around the loss of independence and small experiments to help elderly family members learn new ways of living. Progress also requires mobilizing different family members, doctors and friends to help elderly family members understand and accept the change required.

CHALLENGES ARE BUNDLED

Now, the reality is that the distinction between adaptive and technical problems is not always so clear. Problems often come mixed with technical and adaptive aspects, not neatly packaged into either category. The technical aspects are critical, and many people build credibility from doing great technical work, but your focus is on the adaptive challenge and what it takes to really mobilize for change.

Kind of Work	Problem & Solution Definition	Locus of Work	Type of Work
Technical	Clear	Authority	Optimize Execution
Technical & Adaptive	↕	↕	↕
Adaptive	Requires Learning	Stakeholders	Experiments & Smart Risks

Kind of Work	Problem & Solution Definition	Locus of Work	Type of Work
<i>Technical</i> Broken Arm	Set and Cast Arm	Doctor	Set and Cast Arm as Efficiently and Comfortably as Possible
<i>Adaptive</i> Elderly Parents	Loss of independence; learning new ways of living	Multiple stakeholders; Family members, friends, doctors	Experiment with small changes – e.g. start with not driving at night



EXAMPLES

As part of this session, you’re going to have to come up with your own leadership challenge, which will incorporate both technical and adaptive elements. Before you write your challenge, here are some examples that we’ve encountered to help you get a better sense of what you should be thinking about...

New Kid on the Block

I joined a non-profit organization a few months ago, and I want to prove myself to the team. The organization is struggling with their health outreach programs that could potentially improve the health of thousands of low-income people in the city. I have been tasked with developing and implementing a new outreach strategy for the organization. After months of work, I have identified several critical areas for improvement, e.g. identifying new outreach partners, raising more funds, improving outreach materials. However, I am struggling to get the staff on board with the changes that need to be made. The staff are reluctant to take these ideas on board or have done a half-hearted job implementing them. Meanwhile the CEO says he supports the changes, but he has done very little to help enforce them. I’m losing ground and running out of time, what should I do?

Brand New

I am a Communications Associate. The organization recently re-branded. This meant new fonts, logos and format for all PowerPoint presentations. We have invested in developing an easy to use PowerPoint template for all staff. I have also invested in training the team on best practices for creating presentations. However, I keep seeing presentations that break all the new branding rules and often look unsightly. If I catch them, I can help to clean them up even if it creates more work for me. If I don’t catch them, I worry about how the organization is being perceived externally. What should I do?

New Tricks

I am a CEO at a social enterprise that serves the poor in East Africa. We have been in operation for a number of years and won several awards for our work. The company has been thriving. But if I look ahead, I worry that our growth trajectory is unsustainable. I believe that we need to change the way we do our sales if we are to stay on track. This seems risky to many people at the organization because the old strategy worked so well. Because of the company’s growth, everyone on the team is incredibly busy and I am unsure if the team has the bandwidth to try something new. I also worry that our customers will need to get used to a new way of doing business, even though it will be better for them in the long run. What’s worse is that the new strategy may fail! What should I do?

LIST 3 TECHNICAL ASPECTS FOR EACH CHALLENGE:

New Kid on the Block

Brand New

New Tricks

CHOOSE THE ADAPTIVE FLAGS THAT APPLY TO EACH CHALLENGE (SEE PAGE 5):

New Kid on the Block

Brand New

New Tricks

FILL OUT THIS WORKSHEET FIRST. AND THEN REFER TO THE ANSWER KEY ON PAGE 10.



PREPARE YOUR CHALLENGE

THINK ABOUT YOUR CHALLENGE

Okay! Now that you've gone through some examples, it's time for you to **identify a leadership challenge of your own to work on**. Understanding and identifying this challenge will help to inform and further shape your projects for the fellows program. As you think about your challenge, look at the list of "10 Adaptive Flags" to make sure at least 2-3 are applicable—observe where and how they show up in your own environment, organization or community. These Adaptive Flags will help you test if the challenge you are coming up with is suitable for the session.

WRITE OUT YOUR CHALLENGE

10 ADAPTIVE FLAGS (Indicators of an adaptive challenge)

1. **No Known Solution**—There is a gap between the current reality and aspiration that you don't have the skills or knowledge to close.
2. **People Would Rather Avoid the Issue**—Balancing two ideas is not possible; therefore, working on the challenge creates tension and conflict.
3. **Reason and Logic Alone Won't Get You There**—There are competing values at play or there is a gap between what people say and what they do. For example: "Is there an issue that you/your team/your organization continually talks about but can't solve?"
4. **Recurring Problem**—Challenge reappears after fix is applied. For example: "Have you tried to fix a problem the same way multiple times but it keeps coming back?"
5. **Emotional Response**—Working on this challenge makes people feel uncomfortable; they experience an emotional response such as a feeling in their gut or a knot in a muscle. For example: "When does an emotional reaction shut down an issue?"
6. **Failure to Resolve Competing Priorities**—You are being asked to do more with less instead of making tough trade-offs.
7. **Moving Forward Feels Risky**—Making progress on this challenge means putting your reputation, relationship, and job at risk.
8. **Casualties**—In order to move forward, some people may be left behind.
9. **People Must Work Across Boundaries**—No one person or group can fix the problem alone.
10. **Progress Is Not Linear**—No direct path to get to a better outcome; trial and error is necessary.



SEE YOUR CHALLENGE FROM DIFFERENT PERSPECTIVES

The way that people see the problem is often the biggest part of the problem. From the **Brand New** example on Page 4, you can see that the Communications Associate is treating an adaptive challenge (re-brand of an organization) as a technical problem (use of a PowerPoint). It's important to remember that the technical work is also critical, but we know how to fix it or can delegate to someone who can.

First, let's begin by identifying the **technical** issues you're facing. Use the space below to list 3 technical aspects of your challenge.

Second, let's identify the **adaptive** issues you're facing. Use the space below to list 3 adaptive aspects of your challenge. (Hint: Refer to Page 5 for the list of Adaptive Flags)

Third, let's continue to refine your challenge by looking at the problem from **3 different perspectives**. In developing these different versions, the goal is to create a richer understanding of the challenge that begins to incorporate multiple stakeholders' perspectives.

VERSION 1: Describe the challenge as you normally talk about it with a colleague/friend/community member.

VERSION 2: Describe the challenge as it looks from the perspective of another person involved. Someone who bothers you the most would be best.

VERSION 3: Describe the challenge in a way that shows how you yourself may be contributing to the problem. If you're like most people, you may not show up in Versions 1 or 2.

EXAMPLE #2, FROM PAGE 4: 'BRAND NEW'

The organization recently re-branded. This meant new fonts, logos and format for all PowerPoint presentations. We have invested in developing an easy to use PowerPoint template for all staff. I have also invested in training the team on best practices for creating presentations. However, I keep seeing presentations that break all the new branding rules and often look unsightly. If I catch them, I can help to clean them up even if it creates more work for me. If I don't catch them, I worry about how the organization is being perceived externally. What should I do?

VERSION 1: Get staff on board to use and endorse the re-branding efforts.

VERSION 2: Re-branding efforts affect individual reputations, within teams and more broadly with how external partners view the brand.

VERSION 3: Bring staff into the branding effort in order to co-create and share collective ownership.



Take 15-20 minutes to write the 3 versions of your own challenge.

VERSION 1:

VERSION 2:

VERSION 3:



THINK ABOUT YOUR PURPOSE

THE IMPORTANCE OF PURPOSE

Making progress on an adaptive challenge requires moving off of the status quo, changing behaviors, practices and the way people live their lives. All of these are changes, regardless of how large or small, whether perceived or real. Change itself is not what people resist: No one gives back a winning lottery ticket, and people get married and have children voluntarily (and usually enthusiastically), even though we know these actions will all generate great change. People resist loss or the threat of loss. Loss comes in many types—life, wealth, status, relevance, community, loyalty, identity, competence. Adaptive Leadership involves the distribution of loss or potential loss of moving off the status quo. Making progress on an adaptive challenge requires putting something important at stake. The only reason to have a difficult conversation or to stick your neck out is on behalf of some purpose. Doing adaptive work means being a greater steward of your purpose in creating value for your organization, your community and those around you, and, most importantly, for yourself.

Take a moment to reflect about your purpose for doing this fellowship...

- How does it connect to the challenge you are trying to address in this seminar?
- How does it connect more broadly to the work that you do?
- What values lie behind your life and work?
- How do you remind yourself of your purpose and your values?

Next, write out your purpose statement...

- It should be short and sweet—no more than 1-2 sentences.
- It should capture your values, your motivations, and your passions.
- This purpose statement will be your touchstone for this session. Something that you can keep coming back to, to remind yourself of why it's worthwhile trying to lead through tough challenges.

WRITE YOUR PURPOSE STATEMENT



PART 3: PARTNER DISCUSSION

1-ON-1 WITH YOUR PARTNER (30-60 MINS)

After you've completed the pre-work (both the reading and this packet), you're ready to have your 1-on-1 discussion with your partner. We've already paired you with one of your fellow Fellows, so you should reach out to them directly to set up a time to meet or have a call. The discussion should take around 30-60 minutes, and you should cover the following:

Share with each other your purpose statements (10-15 minutes)

After your partner has shared, ask them a few follow-up/reflection questions. For example...

- How did you come up with your purpose statement?
- Was it easy or difficult to write?
- How did it feel to share your purpose with another person?

Share with each other your leadership challenges (20-30 minutes)

As your partner is sharing his/her leadership challenge, make sure it is indeed an adaptive one. (Hint: Look back at Page 5... does this challenge fit the criteria?) It's important to help them identify a strong challenge because it will be used throughout the session. If your partner's challenge does not meet the criteria, help them brainstorm a new challenge.

Then, go through the three different versions of the challenge, asking follow-up questions like the ones below:

VERSION 1: Describe the challenge as you normally talk about it with a colleague/friend/community member.

- What is your theory on why you haven't already resolved this problem?
- You've identified a gap between your current reality and your aspired state. Why does that gap exist?
- What story have you been telling yourself to explain why the problem persists?

VERSION 2: Describe the challenge as it looks from the perspective of another person involved. Someone who bothers you the most would be best.

- Who is giving you the most trouble with regard to your challenge? How might they view the problem?
- Where do you notice the resistance happening?
- Who are the relevant parties to the challenge, and what are their perspectives on it?

VERSION 3: Describe the challenge in a way that shows how you yourself may be contributing to the problem. If you're like most people, you may not show up in versions 1 or 2.

- How might you be contributing to the problem?
- If a security camera were watching you, what would it see you doing?
- What's a less noble explanation of what you're doing?

Share with each other your overall reflections about this exercise (5-10 minutes)

What were your key takeaways? Do you have a new perspective on anything? Was there a memorable moment or question from the reading, activity, or the discussion?



PART 4: MEET WITH YOUR SPONSOR

Set up a time to speak with your CEO or the leader who is sponsoring your fellowship. Discuss your challenge, project ideas, and your sponsor's expectations of you as a fellow. Coordinate with other fellows if your sponsor/organization is sending multiple fellows under one sponsor.

PART 5: SUBMIT YOUR CHALLENGE

[Click here](#) to visit CLA's website to submit your leadership challenge.

Password: Adapt4AEH

ANSWER KEY

FOR THE ACTIVITY ON PAGE 4

New Kid on the Block

Technical Aspects:

1. Developing and presenting new outreach strategy
2. Identifying new outreach partners
3. Raising more funds
4. Improving outreach materials

Adaptive Flag: 2

Brand New

Technical Aspects:

1. Creating new fonts, logos and formats
2. Developing the PowerPoint template
3. Training the team on PowerPoint presentations
4. Cleaning up old versions of PowerPoint presentations

Adaptive Flag: 2, 3, 4, 9

New Tricks

Technical Aspects:

1. Maintaining sales
2. Hiring new staff to increase bandwidth
3. Surveying current customers
4. Interviewing key staff members

Adaptive Flags: 1, 7