

# LEADER AS TEACHER

## ADAPTIVE LEADERSHIP

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**Note:** Please read the LAT Facilitation Guide prior to delivering this lesson.

### Purpose:

This lesson is designed to introduce leaders to the concept of adaptive leadership. Leaders will learn to identify the difference between technical challenges and adaptive challenges and develop skills in addressing challenges that are adaptive.

### Utilizing Modules

This lesson contains:

- Pre-work: reading or activities to prepare participants for the session
- [LAT Facilitation Guide](#)
- [LAT - Adaptive Leadership PowerPoint](#)
- [LAT – Adaptive Leadership Case Study](#)
- [LAT – Adaptive Leadership Action Plan](#)
- [LAT - Adaptability Leadership on the Line Summary](#)

### Session Logistics:

**Session length:** 120 minutes

- Can be broken into two sessions if needed

**Space needs:**

- White board or easel pads, markers
- Projector for PowerPoint presentation
- Room for small group discussion

**Scribe:** Utilize a scribe to document commitments and key discussion items

### Preparation:

- Identify a key adaptive challenge facing your team. You will use this challenge during the session.
- Email the resource: Leadership on the Line Summary to your team (linked above).
- Read the LAT - Facilitation Guide (linked above)
- Spend time thinking about the strengths and challenges of your direct report team, including how they tend to lead during challenging times and how they respond to employee reactions to change.
- Review the LAT – Adaptive Leadership PowerPoint (linked above) content and discussion questions. Revise both as needed in order to address the specific skills and behaviors needed by your team. Depending on your team member's roles and experience, you may make the questions more challenging or simplify them.
- If you are not familiar with adaptive leadership, consider having OD&L co-facilitate with you.

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### **Your Role as Facilitator:**

Your primary goal as a facilitator is to create an environment that fosters learning, discussion and to keep the work flowing and on track. Guide your team to identify how they will lead and what they will do during current and upcoming changes. You may need to be fairly directive in helping them identify tactics and leadership behaviors depending on their experience in leading through change.

To assist you in accomplishing that goal, this guide is designed with an easy to use format. On the left, you'll see your instructions as the facilitator, and on the right you'll see a snapshot of the corresponding slide or handout. Follow the guide along with the PowerPoint to lead your team through the session.


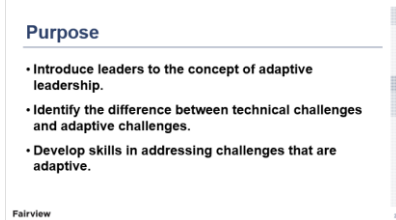

### **Agenda**

- Session Purpose
- Defining Adaptive Leadership
- Technical versus Adaptive Work
- Adaptive Leadership Activities
  - Observe
  - Interpret
  - Intervene
- Adaptive Leadership Challenges
- Commitment to Team Action Plan

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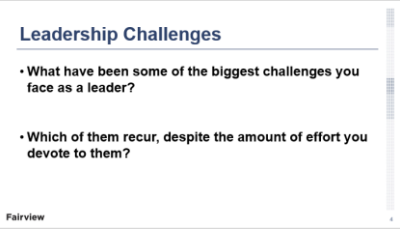
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### Topic Content and Discussion

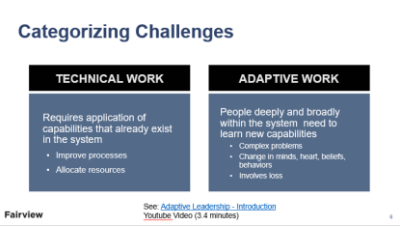
Title Slide: <b>Leader as Teacher – Adaptive Leadership</b>		3 min
SAY:	<p>Welcome to our session today on adaptive leadership.</p> <p>We have been faced with leading in ambiguity and that is not going to change. We are busy and, at times, it is hard to take the time to address challenges that don't have quick or clearly defined fixes.</p> <p>Today, we will take some time to work on one of our key challenges.</p> <p>If there are questions that come up during the session that aren't directly related to the discussion, will put them on the parking lot and address them later.</p>	
DO:	Point out easel pad/white board to use as a parking lot.	
ASK:	Are there any questions before we get into the work?	
Slide 2: <b>Session Purpose</b>		3 min
SAY:	<p>Our discussion today is an introduction to some of the core concepts of adaptive leadership that will help us lead through challenges. And it is only an introduction. Adaptive leadership is complex. We'll provide resources so you can learn more about it. Today we will identify our technical challenges and our adaptive challenges and learn skills in dealing with adaptive issues.</p> <p>I thought it was important to discuss the concepts and work through an adaptive challenge [describe your reason for choosing this topic].</p>	
ASK:	Has anyone been educated on adaptive leadership? [If yes, encourage them to add their knowledge and experience to the discussion].	
Slide 3: <b>Agenda</b>		2 min
SAY:	<p>The topics we will cover today are</p> <p>[Read slide items]</p>	

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Slide 4: <b>Our Leadership Challenges</b>		8 min
SAY:	Let's brainstorm some of the challenges we have faced as leaders and within our business unit. Throw out the challenges that come to mind.	
DO:	Have scribe write down participant's comments. [If the challenge you will be working on in the session isn't identified, add it to the list.]	
ASK:	Of these challenges, which don't get solved or happen over and over?	
DO:	Circle the challenges that participants identify as repetitive. If they miss any that recur, identify those and circle them.	

Slide 5: <b>What is Adaptive Leadership?</b>		4 min
SAY:	<p>We will be using Heifetz and Linsky's adaptive leadership concepts today. Adaptive leadership is the attitudes and behaviors used when faced with complex, tough challenges that cause others to respond emotionally.</p> <p>Adaptive behaviors or techniques by the leader help you move destructive reactions to positive reactions.</p> <p>Let's move into talking about those behaviors and techniques.</p>	

Slide 6: <b>Categorizing Challenges</b>		5 min
SAY:	<p>Adaptive leadership categorizes changes, or challenges as technical or adaptive.</p> <p>Technical challenges are those that can be fixed by processes or resources. Adaptive challenges can't.</p> <p>Let's learn more.</p>	
DO:	Play YouTube video (link in slide) through 1:28.	
ASK:	Do these concepts make sense? If not, the next activity should help.	



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Slide 7: <b>Identifying Technical and Adaptive Challenges</b>		8 min
SAY:	Of the items on our list of challenges, which are technical and which are adaptive?	<p><b>Technical versus Adaptive Challenges</b></p> <p>Of the items we listed:</p> <ul style="list-style-type: none"> <li>• Which are technical?</li> <li>• Which are adaptive?</li> <li>• Which do we spend more time on?</li> </ul>  <p>Fairview</p>
DO:	Write “A” next to the items on the challenges list that are identified as adaptive and “T” next to the ones identified as technical. If you disagree with the decision, discuss the item with your team.	
ASK:	Looking at this list, which do you spend more time on and which do we struggle with?  What do you think are the reasons for this?	
Slide 8: <b>Activities of Adaptive Leadership</b>		3 min
SAY:	<p>There are three key activities of adaptive leadership, according to Heifetz and Linsky.</p> <p>They are to:</p> <ul style="list-style-type: none"> <li>• Observe the entire situation</li> <li>• Then interpret</li> <li>• And finally to intervene</li> </ul> <p>This is a natural process in medicine. However, with all of the decisions and tasks we have as leaders, we don’t often pause long enough to focus on the first two activities.</p>	<p><b>Activities of Adaptive Leadership</b></p> <ul style="list-style-type: none"> <li>• <b>Observe</b> – Yourself first, then others</li> <li>• <b>Interpret</b> – What is going on and what does it mean</li> <li>• <b>Intervene</b> – Decide actions intentionally</li> </ul> <p>Fairview</p>
Slide 9: <b>Start With Observing</b>		3 min
SAY:	<p>We use the phrase “Get on the Balcony” to describe observing from an adaptive leadership perspective. Getting on the balcony helps you step back from your own perspective, beliefs and emotions.</p> <p>Imagine yourself on a dance floor. Think about what you see and experience.</p> <p>Then, imagine yourself on a balcony watching the dancers. Think about what you would see and experience.</p>	<p><b>Start with Observe: “Get on the Balcony”</b></p> <ul style="list-style-type: none"> <li>• Seek perspective</li> <li>• Observe yourself as well as others</li> <li>• Reflect in action</li> </ul>  <p>What do you see, feel, and hear?</p> <p>Fairview</p>
ASK:	<p>What are the differences in what you would experience? What would you see, feel and hear?</p> <p>How can this change your leadership perspective and the decisions you make about what action to take?</p>	


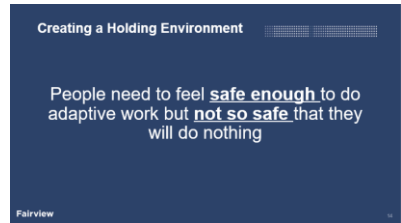
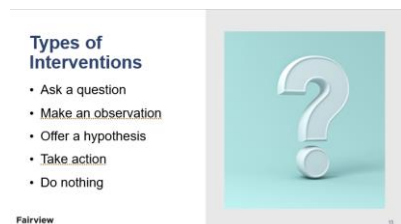
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Slide 10: <b>Observing From the Balcony</b>		5 min
SAY:	<p>[Use the challenge you have chosen for the team to work on in this session]</p> <p>When faced with this challenge, what do we experience when we are in the swirl of it – aka on the dance floor?</p> <p>If we move out of the swirl and to the balcony, what do we observe?</p>	<p><b>Observing from the Balcony</b></p> <p>Thinking about one of our recurring leadership challenges:</p> <ul style="list-style-type: none"> <li>• What do we see, feel, hear when we are in the swirl of the issue?</li> <li>• What do we observe when we are on the balcony?</li> </ul>  <p>Fairview</p>
ASK:	Is this making sense? What questions do you have?	
Slide 11: <b>Interpreting</b>		8 min
SAY:	<p>Doing your utmost to deeply understand the values and perspectives of others is essential in making progress on adaptive issues. That is what it means to interpret.</p> <p>Using our adaptive challenges, let's answer the questions on the slide.</p>	<p><b>Interpret</b></p> <p>To interpret adequately, ask yourself:</p> <ul style="list-style-type: none"> <li>• Which are technical?</li> <li>• Which are adaptive?</li> <li>• Which do we spend more time on?</li> </ul>  <p>Fairview</p>
DO:	Have scribe document the answers the team comes up with.	
ASK:	Are there other questions we should be asking?	
Slide 12: <b>Interpret – Is the Problem Being Avoided</b>		5 min
SAY:	<p>We are all good at avoiding problems. We know many of the ways we do that and we might be surprised by other ways we avoid.</p> <p>[Read through the items on the slide and talk about ways you avoid dealing with problems].</p> <p>It is normal to use these behaviors. We typically do this when we are overwhelmed or when we aren't sure what to do to be successful.</p>	<p><b>Interpret: Is the Problem Being Avoided?</b></p> <p><b>Displacing Responsibility</b></p> <ul style="list-style-type: none"> <li>• Attack authority</li> <li>• Kill the messenger</li> <li>• Scapegoat</li> </ul> <p><b>Distracting Attention</b></p> <ul style="list-style-type: none"> <li>• Pretending to be busy</li> <li>• Define problem to fit your competence</li> <li>• Make the problem too big</li> <li>• Restructure</li> <li>• Meetings with only information exchange when engagement is needed</li> <li>• Task forces</li> <li>• Hire consultants and ignore their advice</li> <li>• Denial</li> </ul> <p>Fairview</p>
ASK:	<p>Which of these behaviors do we tend to use in our team?</p> <p>Which do we see most frequently in our team members?</p> <p>What can and should we do to call this out and help everyone focus on solving the problem?</p>	

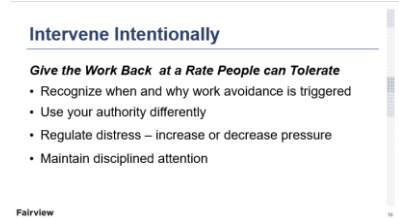
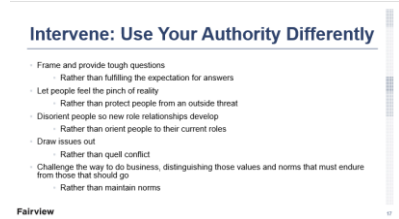

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Slide 13: Intervene Intentionally		2 min
SAY:	<p>Now let's talk about intervening. The best question to keep in mind is "how can we help the group make progress – move towards the change rather than away from it?"</p> <p>And, remember, everything you do, and everything you don't do, is an intervention whether you intend it to be or not. If you walk by someone in the hall and don't say "hello", you are sending a message, whether you want it to or not.</p>	
Slide 14: Create a Holding Environment		1 min
SAY:	<p>The key work of adaptive leadership is keeping people in a productive zone.</p> <p>This means keeping the tension at a level that motivates but doesn't disable them!</p>	
Slide 15: Types of Interventions		3 min
SAY:	<p>There are many types of interventions. In adaptive leadership, it is important to keep the work with the people who need to do it. That includes supporting people in working through their emotions and in identifying why they may be resisting the work. It does not mean doing it for them or doing things to make them feel better.</p> <p>The interventions on this slide do that – help people do their work.</p> <ul style="list-style-type: none"><li>• Ask a question - especially a question you really don't know the answer to.</li><li>• Describe what you see and propose an interpretation which helps others identify what is happening for them.</li><li>• Invite data, facts, perceptions.</li><li>• Do nothing, especially if you are usually the one who takes action. This can be one of the most powerful interventions. It is <b>always</b> useful to ask yourself whether showing up differently than is your usual will be helpful.</li></ul>	

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Slide 16: Intervene Intentionally		5 min
SAY:	<p>As you give the work back to people, pay close attention to signs that people are either too distressed or not distressed enough.</p> <p>We need to create an environment that simultaneously creates some urgency about the work AND gives others enough of what they need to be comfortable so that they can sustain the work.</p>	 <p><b>Intervene Intentionally</b></p> <p><i>Give the Work Back at a Rate People can Tolerate</i></p> <ul style="list-style-type: none"> <li>• Recognize when and why work avoidance is triggered</li> <li>• Use your authority differently</li> <li>• Regulate distress – increase or decrease pressure</li> <li>• Maintain disciplined attention</li> </ul> <p>Fairview</p>
DO:	Describe a time when you experienced too much distress and a time when you experienced too little distress and how it impacted your ability to complete an important project.	
ASK:	<p>What are you seeing in your teams now?</p> <p>Where do we need to increase or decrease pressure?</p>	
Slide 17: Intervene: Use Your Authority Differently		5 min
SAY:	<p>Using your authority or leadership differently gets people’s attention and is one of the ways to increase or decrease pressure.</p> <p>[Read through slide items].</p> <p>In leading from the side or the back, we are helping other’s build skills and resilience and engaging them in the actual work.</p>	 <p><b>Intervene: Use Your Authority Differently</b></p> <ul style="list-style-type: none"> <li>• Frame and provide tough questions <ul style="list-style-type: none"> <li>• Rather than fulfilling the expectation for answers</li> </ul> </li> <li>• Let people feel the pinch of reality <ul style="list-style-type: none"> <li>• Rather than protect people from an outside threat</li> </ul> </li> <li>• Disorient people so new role relationships develop <ul style="list-style-type: none"> <li>• Rather than orient people to their current roles</li> </ul> </li> <li>• Draw issues out <ul style="list-style-type: none"> <li>• Rather than quell conflict</li> </ul> </li> <li>• Challenge the way to do business, distinguishing those values and norms that must endure from those that should go <ul style="list-style-type: none"> <li>• Rather than maintain norms</li> </ul> </li> </ul> <p>Fairview</p>
ASK:	<p>How are you and this leadership team doing this already?</p> <p>With the current challenges facing us now, what must we do from this list?</p>	
Slide 18: Regulating Distress – Lower the Temperature		5 min
SAY:	<p>Here are ways to decrease the pressure. [Paraphrase slide items].</p> <p>Some of these may seem impossible based on the rate of change and the work that is on our plates. And, remember that any action or lack of action is an intervention. Doing something that responds to needs will have an impact.</p>	 <p><b>Intervene: Regulate Distress</b></p> <p><b>Lower the temperature</b></p> <ul style="list-style-type: none"> <li>• Validate feelings, acknowledge loss</li> <li>• Simplify and clarify <ul style="list-style-type: none"> <li>• Address the technical aspects</li> <li>• Break problems into parts</li> </ul> </li> <li>• Restore, add, or reallocate resources <ul style="list-style-type: none"> <li>• Temporarily reclaim responsibility for tough issues</li> <li>• Give your attention</li> <li>• Take stock of what is available</li> <li>• Allot more time, enrich knowledge and skills</li> </ul> </li> </ul> <p>Fairview</p>
ASK:	Which of these will have the most impact for the people on our teams who need to have their distress lowered?	



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Slide 19: Regulate Distress – Raise the Temperature		5 min
SAY:	<p>It can be hard to imagine there is a need to increase pressure or distress – and there is. We often don't create a sense of importance or urgency out of our desire to protect people or to not stress them out.</p> <p>When we see each other or our team members not taking action, or meeting deadlines or not engaging in the challenge, here are ways to get their attention.</p> <p>[Read through slide items].</p>	
ASK:	Which of these will have the most impact for the people on our teams who need to have their distress increased?	
Slide 20: Adaptive Challenges are Disturbing		3 min
SAY:	Now for the reality. Adaptive leadership helps us, our teams and the organization be successful. It is needed. And it is messy. We have to be on top of our game in a new and probably uncomfortable way.	
Slide 21: Relationships with Casualties		8 min
SAY:	<p>There will be casualties – people who can't make it through this challenge. This is true of any change - as situations change, they create a new environment that can't fit everyone.</p> <p>We usually know who is likely to be a "casualty", and if we're willing to be honest about it we can help them and the work by starting a conversation early about what they want/need in their work, whether they are likely to be able to get it where they are currently, and what they might want to do if they believe they cannot. Done well, the change may still be very difficult, but can result in a constructive rather than a destructive experience.</p>	
ASK:	Are there people we are specifically concerned about now? What can and should we be doing to assist them?	

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Slide 22: <b>When the Going Gets Difficult</b>		8 min
SAY:	<p>You have been blamed because of actions you have taken as a leader. It is hard to not take that personally. And, most of the time it is not about you.</p> <p>It is vital that you stay in your leadership role when the going gets tough.</p>	
ASK:	How do we support each other in not taking things personally and staying in our role as adaptive leaders?	
Slide 23: <b>Finalize Actions</b>		5 min
SAY:	<p>We have talked about a lot in this session and we need to make sure we put our knowledge to work.</p> <p>On this action plan, we need to identify how we will keep the learning alive and how we will use it to solve specific adaptive challenges we face.</p> <p>Let's work through this action plan.</p>	
DO:	Work with the team to identify how you will notice adaptive challenges and us the adaptive leadership behaviors. Then develop action steps for two problems the team is working on that are adaptive.	
Slide 24: <b>Resources</b>		2 min
SAY:	<p>Here are some of the resources that can support us and our teams.</p> <p>Thank you for the time, attention and conversation!</p> <p>[If moving on to the case study]: Let's take a break and then we will spend about 30 minutes on working through a case study.</p> <p>[If you are doing the case study in another session]: We'll keep practicing our skills and put them to use in our next session where we work through an adaptive leadership challenge case study.</p>	

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### Post Session

- Complete all actions you committed to during the session.
- Follow up with each of your direct reports to ensure they complete their commitments.
- Gather feedback from your direct reports and their teams related to the change and develop additional action items as needed.
- For additional resources or consultation, contact [ODL@Fairview.org](mailto:ODL@Fairview.org).

### Evaluation

After each lesson, we will send an evaluation to the participating team. Feedback will be used to improve the modules and will identify other development topics and needs.

Please contact [odl@fairview.org](mailto:odl@fairview.org) with any questions.