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the theory and practice of lifelong faith formation

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Competencies for Faith Formation Leadership in the 21st Century

Welcome to the Spring 2011 issue of *Lifelong Faith* and the beginning of our fifth year of publication. This issue of *Lifelong Faith* focuses on “Leadership for 21st Century Faith Formation.” No factor is more critical to developing 21st century faith formation than the quality and effectiveness of faith formation leaders. The competencies described in this issue are designed to help faith formation leaders address the challenges confronting congregations and utilize new opportunities and resources as they seek to provide a 21st century faith formation.

The first article in this issue presents ten foundational principles and practices for exemplary leadership, drawn from **James M. Kouzes and Barry Z. Posner**’s excellent book *The Ten Truths about Leadership*. No one has researched and studied leadership more than Kouzes and Posner. Their book is must reading for every faith formation leader.

The second article, “Becoming a Spirit-Led Leader,” by **Timothy C. Geoffrion** reflects on the need for spiritual leadership in congregations and the world. “Leaders today need many skills, abilities and resources to lead effectively. But the most important ingredient for those called to lead is spiritual depth and vitality, with an ability to let the Holy Spirit work through them in their leadership role.” I have included a study guide for Tim’s book, *The Spirit-Led Leader*, which can be used as a short course in spiritual leadership for an individual or small group.

My essay, “Becoming a Faith Formation Curator,” applies the concept of content curation to the work of the faith formation leader. We are all familiar with museum curators and newspaper editors. The concept is now being applied more widely to curating the vast amounts of digital information online. Digital curators are sifting through this information, evaluating the content, and aggregating the content for particular audiences using websites, blogs, and social media. If faith formation is going to reach all ages and generations, then we are going to have to use all of the resources

available to us. Embracing the role of curator provides faith formation leaders with a means to do this.

Ronald Heifetz and Marty Linsky have pioneered the concept of adaptive leadership through their books and teaching at Harvard University. They describe adaptive leadership as “the activity of mobilizing people to tackle tough challenges and thrive” and help us distinguish between technical problems (which can be fixed) and adaptive challenges that require innovation, learning, and adjustments in the organization. In “Becoming an Adaptive and Innovative Leadership” I have summarized the key concepts of adaptive leadership and provided a guide to using their approach.

Chip Heath and Dan Heath have written a best selling book on change, *Switch: How to Change Things When Change is Hard*, which makes understanding and leading change a lot less complex and fearful. In their essay, “Becoming a Change Leader,” the basic concepts of change are presented along with their three-part framework for change. This is an essential skill for all leaders. Be sure to buy the book!

In the final essay, “Becoming a Culturally Intelligent Leader,” **Linn Van Dyne, Soon Ang, and David Livermore** present a model of cultural intelligence (CQ) that can be applied in a variety of settings with people of diverse cultures. In a culturally diverse world and church the understanding and skills of cultural intelligence will only grow in importance. I have prepared a guide for using their model of cultural intelligence with practical ideas from David Livermore’s book.

I hope this issue helps you become a more effective, more spiritual faith formation leader. This issue is only the beginning of the work that needs to be done in developing the leadership competencies for 21st century faith formation.

John Roberto, Editor



Practicing the 10 Truths about Leadership

From: *The Truth about Leadership: The No-Fads Heart-of-the-Matter Facts You Need to Know*

James M Kouzes and Barry Z. Posner

In The Truth about Leadership James Kouzes and Barry Posner share what they've learned from over 30 years of leadership research (over 1 million responses to their Leadership Practices Inventory), teaching, and writing. The book reports on fundamental principles that inform and support the practices of leadership. "The truths we've written about are things you can count on. They are realities of leadership that will help you to think, decide, and act more effectively. They provide lessons that will sustain you in your personal and professional development. They are truths that address what is real about leadership." Here in summary form are the ten truths.

As much as the context of leadership has change over the past three decades, the *content of leadership* has not changed that much. The fundamental behaviors, actions, and practices of leaders have remained essentially the same since we first began researching and writing about leadership over three decades ago. Much has changed, but there's a whole lot more that's stayed the same.

The Truth about Leadership reveals the most important things we've learned since we began our collaboration. It's a collection of fundamental principles that inform and support the practices of leadership. These are lessons that were true thirty years ago, are true today, and we believe will be true thirty years from now. Fundamentals are the necessary building blocks of greatness. You can't fast-track your way to excellence. Leadership is a demanding, noble discipline not to be entered into frivolously or causally. It requires an elevated sense of mastery. It's a matter of technique, of skill, of practice. It's also a matter of desire and commitment. You can gain mastery over the art and science of leadership by understanding these enduring truths and attending to them in your workplace and everyday life.

James M. Kouzes is the Dean's Executive Professor of Leadership, Leavey School of Business at Santa Clara University. **Barry Z. Posner** is Professor of Leadership at Santa Clara University, where he served as Dean of the Leavey School of Business for twelve years (1996-2009). Together they are the bestselling authors of *The Leadership Challenge*, *A Leader's Legacy*, *Credibility*, and *Encouraging the Heart*.

This article is excerpted from their latest book, *The Truth about Leadership* (Jossey Bass, 2010). Used by permission. Website: www.truthaboutleadership.com.

Truth One. You Can Make a Difference

This is the most fundamental truth of all. Before you can lead you have to believe that you can have a positive impact on others. You have to believe in yourself. That's where it all begins. Leadership begins when you believe you can make a difference.

We've been tracking the impact leaders have on their constituents and the organization for many years. We've analyzed data from well over a million respondents, and hundreds of other researchers have used our model and the *Leadership Practices Inventory* to gather data from thousands more. The findings from all these students point to one very clear conclusion: leaders who use The Five Practices of Exemplary Leadership are seen by others as better leaders.

The Five Practices of Exemplary Leadership is the model of best practices that emerged from our research (see the "Five Practices and Ten Commitments" at the end of this article.) These five "practices" (not "laws" or "principles") are:

1. Model the Way
2. Inspire a Shared Vision
3. Challenge the Process
4. Enable Others to Act
5. Encourage the Heart

People working with leaders who demonstrate *The Five Practices of Exemplary Leadership* are significantly more satisfied with the actions and strategies of their leaders; they feel more committed, excited, energized, influential, and powerful; and they are more productive. In other words, the more you engage in the practices of exemplary leadership, the more likely it is that you'll have a positive influence on others in the organization.

Truth Two. Credibility is the Foundation of Leadership

You have to believe in you, but others have to believe in you, too. What does it take for others to believe in you? Short answer: Credibility. If people don't believe in you, they won't willingly follow you.

It turns out that the believability of the leader determines whether people will willingly give more of their time, talent, energy, experience, intelligence,

creativity, and support. Only credible leaders earn commitment, and only commitment builds and regenerates great organizations and communities.

Year after year the results of our research have been striking in their regularity. And year after year they do not vary significantly by demographical, organizational, or cultural dimensions. It has been quite clear that there are a few essential "character tests" someone must pass before others are willing to grant the designation of leader.

Only four qualities have continuously received an average score of over 60 percent of the votes. Before anyone is going to willingly follow you—or any leader—he or she wants to know that you are:

- Honest (85%)
- Forward-Looking (70%)
- Inspiring (69%)
- Competent (64%)

These four are at the core of others' expectations. They are the basic measures of whether others will consider you to be the leader they'd willingly follow.

In addition to the three factors that measure credibility (honesty, inspiring, and competent), the vast majority of constituents have one other expectation of leaders. They expect leaders to be **forward looking**. People must also believe that you know where you are headed and have a vision for the future. As a leader you are expected to have a point of view about the future. You are expected to articulate exciting possibilities about how today's work will result in tomorrow's world.

Your ability to take strong stands, to challenge the status quo, and to point people in new directions depends on just how credible you are (honest, inspiring, competent). If you are highly credible, people are much more likely to enlist in your campaign for the future. But if others don't believe in you, then the message you are delivering about an uplifting and ennobling future rests on a weak and precarious foundation. People may actually applaud your vision of the future but be unwilling to follow you in that direction. They may agree that what you are saying needs to be done, but they just won't have the faith and confidence that you are the one to lead them. ***If you don't believe in the messenger, you won't believe the message.***

If you are going to lead, you must have a relationship with others that is responsive to their expectations that you are someone they can believe

in. If people are going to willingly follow you, it is because they believe you are credible. To be credible in action, ***you must do what you say you will do.*** That means that you must be so clear about your beliefs that you can put them in practice every day. The consistent living out of values is a behavioral way of demonstration honesty and trustworthiness. It proves that you believe in the path you have taken and are progressing forward with energy and determination.

Truth Three. Values Drive Commitment

People want to know what you stand for and believe in. They want to know what you value. They want to know what others value if they are going to be able to forge alignments between personal values and organizational demands.

You can only fully commit to organizations and other causes when there is a good fit between what you value and what the organization values. That means that to do your best as a leader you need to know who you are and what you care about. You need a set of values that guide your decisions and actions. To discover who you are and what you care about, you need to spend some time on the inner work of a leader—in reflection on finding your voice. And keep in mind that it's not just your values that matter. What is true for you is true for others: they too must find a fit with who they are and what they value. Credible leaders listen, not just to their own aspirations, but also to the needs and desires of others. Leadership is a relationship, and relationships are built on mutual understanding.

Truth Four. Focusing on the Future Sets Leaders Apart

The capacity to imagine and articulate exciting future possibilities is a defining competence of leaders. Leaders are custodians of the future. They are concerned about tomorrow's world and those who will inherit it. They ask, "What's new? What's next? What's going to happen after the current project is completed?" They think beyond what's directly in front of them, peer into the distance, imagine what's over the horizon, and move forward toward a new and compelling future.

Your constituents expect you to know where you're going and to have a sense of direction. You have to be forward-looking; it's the quality that most differentiates leaders from individual contributors. Getting yourself and others focused on the exciting possibilities that the future holds is your special role on the team.

Developing the capacity to envision the future requires you to spend more time *in* the future—meaning more time reflecting on the future, more time reading about the future, and more time talking to others about the future. It's not an easy assignment, but it is an absolutely necessary one. It also requires you to reflect back on your past to discover the themes that really engage you and excite you. And it means thinking about the kind of legacy you want to leave and the contributions you want to make.

Truth Five. You Can't Do It Alone

No leader ever got anything extraordinary done without the talent and support of others. Leadership is a team sport, and you need to encourage others in the cause. What strengthens and sustains the relationship between leader and constituent is that leaders are obsessed by what is best for others, not what is best for themselves.

Leaders alone don't make anything great. Leadership is a shared responsibility. You need others, and they need you. You're all in this together. To build and sustain that sense of oneness, exemplary leaders are sensitive to the needs of others. They ask questions. They listen. They provide support. They develop skills. They ask for help. They align people in a common cause. They make people feel like anything is possible. They connect people to their need to be in charge of their own lives. They enable others to be even better than they already are.

Truth Six. Trust Rules

If you can't do it alone and have to rely on others, what's needed to make that happen? Trust is the social glue that holds individuals and groups together. And the level of trust others have in you will determine the amount of influence you have. You have to earn your constituents' trust before they'll be willing to trust you. That means you have to give trust before you can get trust.

Trust rules your personal credibility. Trust rules your ability to get things done. Trust rules your team's cohesiveness. Trust rules your organization's innovativeness and performance. Trust rules just about everything you do.

How can you facilitate trust? Research has shown that a few key behaviors contribute to whether or not others perceive you as trustworthy. Here are four actions to keep in mind:

- Behave predictably and consistently.
- Communicate clearly.
- Treat promises seriously.
- Be forthright and candid.

Getting people to work together begins with building mutual trust. Before asking for trust from others, you must demonstrate your own trust in them. That means taking the risk of disclosing what you stand for, value, want, hope for, and are willing and unwilling to do. You also have to be predictable and consistent in your actions: forthright, candid, and clear in your communication; and serious about your promises. And, as we've learned so many times, leaders are far better served when they're forthcoming with information. There's nothing more destructive to trust than deceit, and nothing more constructive than candor.

Truth Seven. Challenge Is the Crucible for Greatness

Exemplary leaders—the kind of leaders people want to follow—are always associated with changing the status quo. Great achievements don't happen when you keep things the same. Change invariably involves challenge, and challenge tests you. It introduces you to yourself. It brings you face-to-face with your level of commitment, your grittiness, and your values. It reveals your mindset about change.

The study of leadership is the study of how men and women guide people through uncertainty, hardship, disruption, transformation, transition, recovery, new beginnings, and other significant challenges. It's also the study of how men and women, in times of constancy and complacency, actively seek to disturb the status quo, awaken new possibilities, and pursue opportunities.

All significant and meaningful accomplishments involve adversity, difficulty, change, and challenge. No one ever got anything extraordinary done by

keeping things the same. Risk, uncertainty, and hardships test us. Initiative and grit are imperatives in times of uncertainty. You have to embrace the challenge, control what you can, and take charge of change to be successful in these turbulent times. To deal with setbacks and to bounce back from mistakes, you need grit. You also need to find ways to learn from failure, knowing that's one of the best teachers you can have.

Truth Eight. You Either Lead by Example Or You Don't Lead At All

Leaders have to keep their promises and become role models for the values and actions they espouse. You have to go first as a leader. You can't ask others to do something you aren't willing to do yourself. Moreover, you have to be willing to admit mistakes and be able to learn from them.

We know that credibility is the foundation of leadership (Truth #2). What is credibility behaviorally? How do you know it when you see it? The most frequent answer we get in our research is: You have to *Do What You Will Say You Will Do*, or DWYSYWD for short.

Seeing is believing, and our constituents have to see you living out the standards you've set and the values you profess. You need to go first in setting the example for others. That's what it takes to get others to follow your lead. A big part of leading by example is keeping your promises. Your word is only as good as your actions. You have to realize that others look to you and your actions in order to determine for themselves how serious you are about what you say, as well as understand what it will mean for them to be "walking the talk." Your statements and actions are visible reminders to others about what is or is not important. And when you make a mistake, admit it. Admitting your mistakes and shortcomings goes a long way toward building up people's confidence in your integrity. It gives them one more important reason to put their trust in you.

Truth Nine. The Best Leaders Are the Best Learners

You have to believe that you (and others) can learn to lead, and that you can become a better leader tomorrow than you are today. Leaders are constant improvement fanatics, and learning is the master

skill of leadership. Learning, however, takes time and attention, practice and feedback, along with good coaching. It also takes a willingness on your part to ask for support.

Leadership is not preordained. It is not a gene, and it is not a trait. There is no hard evidence to support the assertion that leadership is imprinted in the DNA of only some individuals and that the rest of us missed out and are doomed to be clueless.

Leadership can be learned. It is an observable pattern of practices and behaviors, and a definable set of skills and abilities. Skills can be learned, and when we track the progress of people who participate in leadership development programs, we observe that they improve over time. They learn to be better leaders as long as they engage in activities that help them learn now.

But here's the rub. While leadership can be learned, not everyone learns it, and not all those who learn leadership master it. Why? Because to master leadership you have to have a strong desire to excel, you have to believe strongly that you can learn new skills and abilities, and you have to be willing to devote yourself to continuous learning, and deliberate practice. No matter how good you are, you can always get better.

You can develop yourself as a leader, but it takes a continuous personal investment. It takes time, it takes deliberate practice, it requires setting improvement goals, staying open to feedback, working on your strengths and weaknesses, and having the support of others. Moreover, the very best leaders also believe that it's possible for everyone to learn to lead. By assuming that leadership is learnable, you stay open to opportunities to turn the workplace into a practice field and every experience into a chance to grow. By believing in yourself and your capacity to learn to

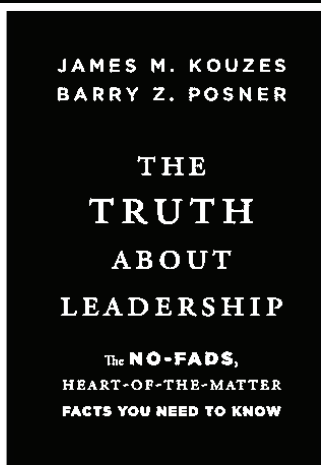
lead, you make sure you're prepared to take advantage of the many opportunities that are open to you.

Truth Ten. Leadership Is an Affair of the Heart

It could also be the first truth. Leaders are in love with their constituents, their customers and clients, and the mission that they are serving. Leaders make others feel important and are gracious in showing their appreciation. Love is the motivation that energizes leaders to give so much for others. You just won't work hard enough to become great if you aren't doing what you love.

There's no integrity and honor with heart. There's no commitment and conviction without heart. There's no hope and faith without heart. There's no trust and support without heart. There's no learning and risk taking without heart. Nothing important ever gets done without heart. Purely and simply, exemplary leaders excel at improving performance because they pay great attention to the human heart.

Leaders put their hearts in their organizations and their organizations in their hearts. They love what they're doing and they stay in love with leading, with the people who do the work, with what their organizations produce, and with those who honor them by using their products and services. They show they care by paying attention to people, sharing success stories, and making people feel important and special. Exemplary leaders are positive and upbeat, generating the emotional energy that enables others to flourish.



The Truth about Leadership

James M. Kouzes and Barry Z. Posner (Jossey-Bass, 2010)

In these turbulent times, when the very foundations of organizations and societies are shaken, leaders need to move beyond pessimistic predictions, trendy fads, and simplistic solutions. They need to turn to what's real and what's proven. In their new book, Kouzes and Posner reveal ten time-tested truths that show what every leader must know, the questions they must be prepared to answer, and the real-world issues they will likely face. Based on thirty years of research, the book explores the fundamental, enduring truths of leadership that hold constant regardless of context or circumstance—leaders make a difference, credibility, values, trust, leading by example, heart, and more; and shows leaders what they need to know to be effective.

Five Practices & Ten Commitments of Leadership

The Leadership Challenge (4th Edition)

James M. Kouzes and Barry Z. Posner

In *The Leadership Challenge* James Kouzes and Barry Posner identify five practices and ten commitments for leadership drawn from their extensive research with leaders in organizations. They write that leadership is about how leaders mobilize others to want to get extraordinary things done in organizations. "It's about the practices the leaders use to transform values into actions, visions into realities, obstacles into innovations, separateness into solidarity, and risks into rewards." The following overview introduces the practices and commitments and provides a tool for leaders to examine their own leadership practices and ways to improve their effectiveness.

Practice 1. Model the Way

Leaders stand for something, believe in something, and care about something. They find their voice by clarifying their personal values and then expressing those values in their own unique and authentic style. Leaders also know that they cannot force their views on others. Instead, they work tirelessly to forge consensus around a set of common principles. Leaders must set the example by aligning their personal actions with shared values. Modeling the way is essentially about earning the right and the respect to lead through direct individual involvement and action. People first follow the person, then the plan.

Commitments

1. Find your voice by clarifying your personal values.
2. Set the example by aligning actions with shared values.

Personal Reflection

- *What are the personal values you bring to your leadership approach and style?*
- *How well aligned are your leadership actions with the shared values in your congregation?*

Practice 2. Envision the Future.

Leaders envision the future by imaging exciting and ennobling possibilities. They dream of what might be, and they passionately believe that they can make a positive difference. They envision the future, creating an ideal and unique image of what the community or organization can become. But visions seen by the leader are insufficient to mobilize and energize. Leaders enlist others in exciting possibilities by appealing to shared aspirations. They breathe life into the ideal and unique images of the future and get others to see how their own dreams can be realized by embracing a common vision.

Commitments

3. Envision the future by imaging exciting and ennobling possibilities.
4. Enlist others in a common vision by appealing to shared aspirations.

Personal Reflection

- *What is your vision for the future of your congregation? for the future of faith formation?*
- *How do you enlist others in envisioning the future?*

Practice 3. Challenge the Process

The work of leaders is change. To them the status quo is unacceptable. Leaders search for opportunities by seeking innovative ways to change, grow, and improve. They seize the initiative to make things happen. And knowing they have no monopoly on good ideas, leaders constantly scan the outside environment for creative ways to do things. Leaders experiment and take risks by constantly generating small wins and by learning from mistakes. And, despite persistent opposition and inevitable setbacks, leaders demonstrate the courage to continue the quest. Exemplary leaders know that they have to be willing to make some personal sacrifices in service of a higher purpose.

Commitments

5. Search for opportunities by seeking innovative ways to change, grow, and improve.
6. Experiment and take risks by constantly generating small wins and learning from mistakes.

Personal Reflection

- *How do you seek out opportunities for innovation? What are the current opportunities for innovation?*
- *How do you lead the implementation of new, innovative projects?*

Practice 4. Enable Others to Act.

Leaders know they cannot do it alone. It takes partners to get extraordinary things done in an organization. So, leaders foster collaboration by promoting cooperative goals and building trust. They develop teams with spirit and cohesion. They promote a sense of reciprocity and a feeling of “we’re all in this together.” Leaders understand that mutual respect is what sustains extraordinary efforts. Leaders strengthen others by sharing power and providing choice, making each person feel competent and confident. They nurture self-esteem and sustain human dignity.

Commitments

7. Foster collaboration by promoting cooperative goals and building trust.

8. Strengthen others by sharing power and discretion.

Personal Reflection

- *What are the ways you enable others to act by fostering collaboration and strengthening others?*

Practice 5. Encourage the Heart.

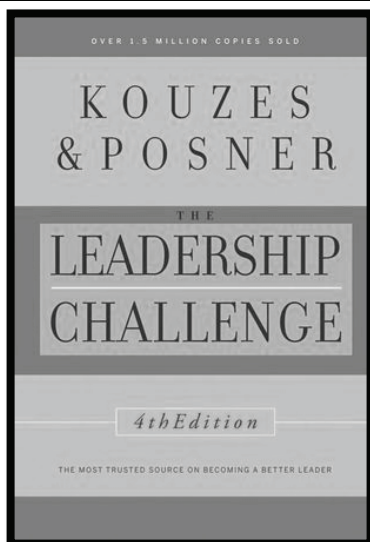
Getting extraordinary things done in organizations is hard work. To keep hope and determination alive, leaders need to recognize contributions by showing appreciation for individual excellence. Genuine acts of caring uplift spirits and strengthen courage. On every winning team, the members need to share in the rewards of their efforts. So leaders should celebrate the values and the victories by creating a spirit of community. This means expressing pride in the accomplishments of their team and making everyone feel like everyday heroes.

Commitments

9. Recognize contributions by showing appreciation for individual excellence.
10. Celebrate the values and victories by creating a spirit of community.

Personal Reflection

- *How do you recognize the contributions of others?*
- *How do you celebrate accomplishments?*



The Leadership Challenge (4th Edition)

James M. Kouzes and Barry Z. Posner (Jossey-Bass, 2007)

This leadership classic continues to be a bestseller after three editions and twenty years in print. It is the gold standard for research-based leadership, and the premier resource on becoming a leader. This new edition, with streamlined text, more international and business examples, and a graphic redesign, is more readable and accessible than ever before. *The Leadership Challenge*, Fourth Edition, has been extensively updated with the latest research and case studies, and offers inspiring new stories of real people achieving extraordinary results. The authors' central theme remains the same and is more relevant today than ever: “Leadership is Everyone’s Business.” Their “five practices” and “ten commitments” have been proven by hundreds of thousands of dedicated, successful leaders. This edition, with almost one-third new material, emphasizes the global community and refocuses on business leaders.



Becoming a Spirit-Led Leader

Timothy C. Geoffrion

To be the leaders God intends us to be and to lead in ways that honor God and bear the fruit God intends, what is needed is nothing short of personal transformation—a true inner change of heart, mind, and soul—that ultimately leads to a transformation of our leadership. Though many external factors may influence our effectiveness as leaders, it is the internal ones that we must come to grips with if we truly want to become the leaders we have been called to be.

Inner transformation begins with a willingness and commitment to do the hard work of personal and professional development. In the personal dimension of growth, we need to believe that as we become more whole people, our ability to lead will become both broader and deeper. We need to value developing emotionally, socially, psychologically, and spiritually, believing that as we grow as people, we will grow as leaders.

The professional dimension of growth is equally important. Periodically, someone will object to calling pastors or other Christian ministry leaders “professionals.” Some fear weakening the prophetic voice of the Christian leader; others worry about contaminating the sacred nature of the calling. I, too, am deeply concerned that Christian leaders maintain a clear witness and a vibrant spirituality, but I am not afraid of the professional label. In fact, I welcome it, because to me it communicates a commitment to high standards, integrity, and skilled service. To reach our potential as leaders, we need to see ourselves as professionals, in the best sense of the word, and seek to grow in every way possible.

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This article is excerpted from the “Introduction” in *The Spirit-Led Leader: Nine Leadership Practices and Soul Principles* published by The Alban Institute (Herndon, 2005). Used with permission.

Then comes action. We need to roll up our sleeves, draw on available resources, and set aside the necessary time and energy to develop ourselves. We need to learn to do our jobs better, to acquire more knowledge, and to try new strategies and tactics. We need to do our own personal “work” to get healthier and to mature, and to develop whatever professional skills we can to excel in our jobs.

Yet professional growth goes beyond acquiring new information, skills, and methods. Inner transformation means a fundamental change in our mind-set, so that we truly think differently, and perceive God, others, our work, and ourselves in healthier and more constructive ways. It also involves a change in our heart, so that we increasingly become motivated by love.

The process of internal change is not the same for everyone. The potential catalysts may include formal education, inner healing, confession of sins and repentance, the discipline of being mentored, meaningful relationships, experiences with others, and psychotherapy. Inner transformation can come also from first making concrete changes in behavior, such as adjusting our operating policies and procedures, practicing new leadership styles, and reordering our priorities—provided that these changes are not gimmicks or furtive attempts to manipulate others.

Above all, the greatest potential contributor to personal and professional development is our own spiritual growth. As our relationship with God deepens and we learn to integrate our spiritual life and leadership more fully, we will begin to understand spiritual leadership in new ways. As we seek to lead in ways that focus on what God is doing in us and in the organization we serve, we will experience more of the abundant life than we imagined possible, and so will those who work with us.

Spiritual Transformation

A simple definition of spirituality is our sense of connection to God. I am assuming a Christian frame of reference, based on New Testament teaching. God is our Creator, and we live because of the life God gives us (Acts 17:24-28). While God is distinct from his creatures, God is also present within believers through the Holy Spirit (Eph. 1:13). As human creations, we have a spiritual dimension that allows

us to commune with our unseen Creator God, who is spirit (John 4:24). God’s Spirit within us is what makes inner transformation possible and gives us the power to live godly lives (Gal. 5:16-25).

For many Christians, connection to God takes the form of a strong personal relationship with Christ. An informal survey I conducted among Christian leaders resulted in a number of definitions of spirituality that focused on Christ. One pastor said, “Spirituality is the pursuit of Christ, leading to a life like Christ’s.” A church historian, Mark Burrows of Andover Newton Theological Seminary, who has done extensive academic work on the subject, defines spirituality as a “lived experience and expression of Christian life.”

Regardless of one’s definition of spirituality, people have varying degrees of awareness of God and God’s presence in their lives, from a vague sense of a life force within or around them to an intimate, personal relationship with God. The greater our sense of connection to God and the more that connection affects our life, the more vital our spirituality. Thus, vital spirituality refers to a strong sense of connection to God that significantly influences our thinking, feeling, and behavior.

Spiritual transformation involves inner changes that make our spiritual life more vital. All of us have a spiritual dimension to our lives, but we do not all experience spiritual transformation; and of those who experience spiritual transformation, not all experiences are the same. Yet from a biblical point of view, spiritual transformation is rooted in God’s work in our life and involves many recognizable cognitive, emotional, and behavioral changes.

First, spiritual transformation includes an ongoing process of moving from a self-centered worldview and self-serving functioning to a God-centered perspective and devotion to serving God’s purposes. For Christians, God-centered thinking and living lead to placing God (Father, Son, and Holy Spirit) at the center of one’s life. God is the source of life. God redeems our life and provides the power to live out our God-given purpose in life. In more personal terms, spiritual transformation also deepens our awareness of God’s love for us and increases our love for God. The greater our transformation, the more God’s love permeates our senses, our thinking, and our way of living.

The paradox of spiritual transformation is that we serve our own best interests when we abandon self-serving thinking and behavior to serve God by following Christ. Jesus’ startling words to his

disciples illustrate the paradoxical nature of vital spirituality. He says in effect that if we truly have our own best interests in mind, we will renounce our attempts to please and serve ourselves to follow him and serve the gospel. Mark summarized Jesus' teaching on the subject this way:

[Jesus] called the crowd with his disciples, and said to them, "If any want to become my followers, let them deny themselves and take up their cross and follow me. For those who want to save their life will lose it, and those who lose their life for my sake, and for the sake of the gospel, will save it." Mark 8:34-35 (NRSV)

Mark, then, maintains that "life" is attainable only through a certain kind of response to Jesus and the gospel Jesus proclaimed: life comes to those who have faith in and are devoted to Jesus, evidenced by their renouncing the impulse to trust in and rule their own life and by following Jesus even to the point of suffering and death. The broader context of the Gospel of Mark indicates that Jesus had in mind more than just saving their physical life; he was talking about a quality of life that begins in this life and extends into the next.

For our purposes here, Jesus' main point is that the way to this quality of life begins with a right relationship with God. The alternative to gaining one's life Jesus' way is ultimately losing one's life—through attempts to gain it by promoting oneself and one's will alone, in isolation from an awareness of or devotion to God. Thus, the resolution of the paradox that we lose our life to find it is that the conflict is not between anti-self and pro-self; the conflict is living one's life out of a right relationship with God versus trying to go it alone without reliance on God.

John the Evangelist talked about vital spirituality as eternal life, a special quality of life produced by the Holy Spirit. We first experience it in the course of our natural life, and it extends into eternity. He begins to explain this concept by telling the story of Jesus and Nicodemus, in which Jesus taught that participation in the kingdom of God requires spiritual transformation; that is, being born of the Spirit.

Jesus answered, "Very truly, I tell you, no one can enter the kingdom of God without being born of water and Spirit. What is born of the flesh is flesh, and what is born of the Spirit is spirit. Do not be

astonished that I said to you, 'You must be born from above.' The wind blows where it chooses, and you hear the sound of it, but you do not know where it comes from or where it goes. So it is with everyone who is born of the Spirit." (John 3:5-8 NRSV)

In the same chapter, Jesus indicates that the spiritual birth he described to Nicodemus not only is produced by the Spirit; it comes about because of God's great love for humanity, which he demonstrated by giving his Son to save the world. The required human response to God's love and Jesus' sacrifice is faith, to which John alluded earlier in the Gospel when he described Jesus as the Lamb who takes away the sin of the world (John 1:29). By trusting in Christ, we may have an assurance of forgiveness of sins and freedom from fear of condemnation:

For God so loved the world that he gave his only Son, so that everyone who believes in him may not perish but may have eternal life. Indeed, God did not send the Son into the world to condemn the world, but in order that the world might be saved through him. (John 3:16-17 NRSV)

From this one chapter in John, we can develop a definition: spiritual transformation includes recognizing God's loving initiative in Christ, experiencing a dynamic encounter with the Spirit of God, and having faith in Jesus as God's Son, who gave his life to save the world.

The apostle Paul's writings consistently affirm what Mark and John pointed to about the spiritual life, especially emphasizing the transformative role of the Holy Spirit. Among many references, Paul describes the vital spiritual life as being set free from condemnation and the power of sin by the power of the Holy Spirit at work within those who are in relationship to Christ (Rom. 8:1-2). He sums up his teaching by saying, "For all who are led by the Spirit of God are children of God" (Rom. 8:14).

Late in the chapter Paul stresses an important quality of God's love for those who have faith in Jesus Christ: God's love is permanent and utterly reliable. He concludes:

For I am convinced that neither death, nor life, nor angels, nor rulers, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation will be able to

separate us from the love of God in Christ Jesus our Lord. (Romans 8:38-39 NRSV)

God's part in our spiritual transformation is to provide forgiveness and eternal life through our faith in Jesus Christ and the activity of the Holy Spirit in our life. Our part in cultivating our spiritual life includes an appropriate response to all that God provides. We begin with faith and move to putting our life at the complete disposal of God to serve God's will in every way possible. Paul describes this response as offering ourselves as a "living sacrifice" and renewing our minds that we may be transformed:

I appeal to you therefore, brothers and sisters, by the mercies of God, to present your bodies as a living sacrifice, holy and acceptable to God, which is your spiritual worship. Do not be conformed to this world, but be transformed by the renewing of your minds, so that you may discern what is the will of God—what is good and acceptable and perfect. (Romans 12:1-2 NRSV)

Spiritual transformation also includes learning to let the Holy Spirit produce certain desirable qualities within us and in our relationships. Paul depicts this phenomenon as "walking by the Spirit;" he lists many of the attributes of the Spirit-led person in his letter to the Galatians:

Live by the Spirit, I say, and do not gratify the desires of the flesh. . . . The fruit of the Spirit is love, joy, peace, patience, kindness, generosity, faithfulness, gentleness, and self-control. There is no law against such things. . . . If we live by the Spirit, let us also be guided by the Spirit. (Galatians 5:16, 22-23, 25 NRSV)

Finally, transformative spiritual experiences usually come with a significant emotional response. Peter describes the joy, hope, and love that faith produce:

Blessed be the God and Father of our Lord Jesus Christ! By his great mercy he has given us a new birth into a living hope through the resurrection of Jesus Christ from the dead, and into an inheritance that is imperishable, undefiled, and unfading, kept in heaven for you. . . . In this you rejoice, even if now for a little while you have had to suffer various trials. . . . Although you have not

seen him, you love him; and even though you do not see him now, you believe in him and rejoice with an indescribable and glorious joy, for you are receiving the outcome of your faith, the salvation of your souls. (1 Peter 1:3, 6, 8-9 NRSV)

In sum, as the example and teaching of Jesus and various biblical writers affirm, spiritual transformation involves many cognitive, emotional, and behavioral changes in the life of a believer. God's loving and gracious activity leads us to embrace and pursue an intimate, loving relationship with God the Father, Son, and Holy Spirit. As we increasingly grasp the magnitude of God's grace, we grow in our gratitude and joyful appreciation for all God has done for us. We increasingly move from a self-centered to a God-centered orientation, making significant changes in our perspective and priorities. As the Holy Spirit gains greater influence within us, we become Spirit-led people who live out our calling in life by God's leading and power. We are increasingly changed from the inside out, experiencing faith, hope, love, and other fruits of the Spirit.

Spiritual Leadership

Spiritual leadership is something we offer to others when we consciously draw on God as the wellspring for our life and leadership. Spiritual leaders, like all spiritually vital individuals, seek to be continually transformed through their relationship to God. In addition, spiritual leaders use their own faith, experience, and knowledge of spiritual principles and practices, as well as their position of leadership, to influence their workplace spiritually.

As the context permits, spiritual leaders also consciously foster connection to and reliance on God among staff, church leaders, and the congregation. They seek to cultivate a spiritually rich environment—not to promote doctrine but to catalyze team members to seek God and God's will together. In short, spiritual leaders, in every way possible within the boundaries of their leadership context, seek the Holy Spirit's leading for themselves and for their team members as they work together. They are Spirit-led leaders, who seek to pilot Spirit-led teams and congregations.

Congregations, co-workers, and staff members are often longing for Spirit-led leaders to bring spiritual vitality into the workplace, whether they

realize it or not. They want greater depth of wisdom, discernment, and spiritual sensitivity in their leaders. They need help to avoid losing their souls as they attempt to navigate a fast-paced, high-pressure, performance-oriented culture that has an insatiable appetite for results. They want their experience as leaders to match the values their organization espouses to congregation members. They want to be fully valued as contributing members of the body of Christ, and treated respectfully as spiritually gifted individuals.

However, while the value of spiritual leadership is evident, few leaders seem to grasp what is needed, let alone have the ability to provide it. They may feel inadequate or stymied in their efforts to be spiritual leaders. They may be unsure how to integrate spiritual emphases with congregational or ministry goals and objectives. Leaders may not be able to get past their own performance- and results-oriented mentality. They also may not see how they can both show care and compassion for those they lead *and* produce the results expected of them. They may not know how to pursue a deeper spiritual life or how to let their leadership be transformed by it, let alone how to foster a richer spiritual environment among their co-workers. For whatever reasons, a vacuum of effective spiritual leadership exists in many churches and organizations today.

The Way Forward

The solution is spiritual leadership by Spirit-led leaders. Such leaders will cultivate a vital personal relationship to God that they consciously seek to

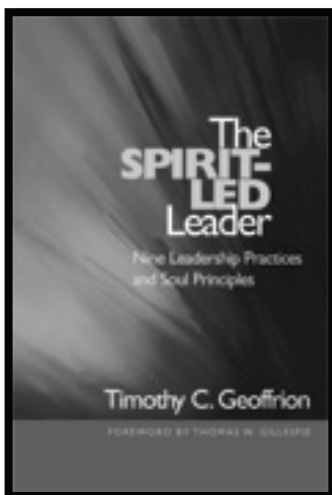
integrate with their leadership, leading to a transformation of themselves and their leadership.

What's needed is at its core spiritual—spiritual renewal, spiritual vitality, spiritual growth, and spiritual leadership. I'm talking about truly understanding who we are, why we are alive in this world at all, what it means to be a leader, and how we can best fulfill our purpose in life.

The more leaders see themselves as precious children of God, created to experience the love of God deeply and personally and to live out their calling in love, the more leaders will be able to function powerfully and effectively from a deeply spiritual base. The basic image is one of a deep well, filled with clean, refreshing water that flows freely to all those who tap into its source. The more leaders become deep spiritual wells, the more they will be capable of meeting the incredible challenges in today's world and of leading others to greater depth, wholeness, and fruitfulness.

What we need, then, are leaders who see themselves first and foremost as spiritual leaders. They value their relationship with God above all else, and then see their vocation as an outgrowth of their spiritual life. More, they both consciously and subconsciously draw on God as the wellspring for their entire life.

Leaders today need many skills, abilities and resources to lead effectively. But the most important ingredient for those called to lead is spiritual depth and vitality, with an ability to let the Holy Spirit work through them in their leadership role.



The Spirit-Led Leader: Nine Leadership Practices and Soul Principles

Timothy C. Geoffrion (Alban Books, 2005)

In our postmodern, experience-oriented culture, people are longing for greater authenticity, integrity, and depth in their pastors and leaders. Leaders often struggle with knowing how to integrate their spiritual values and practices into their leadership and management roles. Designed for Christian leaders, *The Spirit-Led Leader* addresses the critical fusion of spiritual life and leadership for those who not only want to see results but also desire to care just as deeply about who they are and how they lead as they do about what they produce and accomplish. Geoffrion creates a new vision for spiritual leadership as partly an art, partly a result of careful planning, and always a working of the grace of God.

A Guide for Spirit-Led Leadership

A Study-Reflection Activity using *The Spirit-Led Leader Book*

God made the soul of a leader to be intimately connected to him and to be the wellspring from which the leader leads and from which strong, visionary, confident leadership flows. The more our spiritual life and leadership are integrated, the more we truly become spiritual leaders. Our spirituality will become the inspiration and power for our leadership, as well as its defining characteristics. Spiritual leadership is what leaders need to thrive and what others are looking for and need from us. With God's help, this vision can become more of a reality for each one who is called to leadership.

(Timothy C. Geoffrion)

Chapter 1. The Vision

Leadership Practice: Envision your leadership flowing out of a deep spiritual life.

Soul Principle: Fruitfulness in leadership requires the work of God in and through us.

1. Read Chapter 1 in *Spirit-Led Leadership*.
2. Complete the reflection questions.
 - How have I experienced tension between my spiritual life and my leadership role and responsibilities?
 - How would I be different as a leader if my spiritual life flowed more freely and fully into my leadership daily?
3. Take time to prayerfully reflect on the Bible passages.
 - Luke 2:46-49; 4:42-43; 5:15-16; 22:42
 - John 15:1-13
 - I Corinthians 12:4-7
 - Philippians 2:12-13

Chapter 2. Connecting to God

At its core, a vital spiritual life is about a dynamic, loving relationship with God through Jesus Christ, which transforms our thinking, feeling, and acting.

Leadership Practice: Actively cultivate your own spiritual life.

Soul Principle: Spiritual vitality flows from a real change of heart and mind toward God.

1. Read Chapter 2 in *Spirit-Led Leadership*.
2. How can you practice the presence of God using the “Four Ways.” How could utilize the “Four Ways” in your own life? (See pages 57-63.)
 - Way 1. Brief Awareness of God
 - Way 2. A Simple Heart Prayer
 - Way 3. Live and Work in the Company of God.
 - Way 4. Contemplation
3. Complete reflection questions.
 - How welcome is God as my constant companion and co-worker?
 - How do I seek to connect with God through my day?
 - What works best? What isn't working?
 - What is something I want to do differently to help me to better connect with God in the midst of my life and work?
4. Take time to prayerfully reflect on the Bible passages.
 - Matthew 22:37-39
 - Colossians 1:28-29; 3:17
 - Romans 5:5; 8:13-14; 9:21
 - Philippians 2:5-11
 - Galatians 5:22-26
 - Hebrews 5:7

Chapter 3. Spiritual Disciplines

Practicing spiritual disciplines cultivates a conscious sense of the presence and activity of God in our life through intention and consistency. The goal is to produce concrete change in our attitudes and behaviors that will, in turn, increase our effectiveness in all spheres of our life, including leadership.

Leadership Practice: Develop specific spiritual disciplines.

Soul Principle: Disciplines deepen our spiritual life and empower our leadership.

1. Read Chapter 3 in *Spirit-Led Leadership*.

2. How are you practicing the spiritual disciplines in your life today. How could you incorporate them more fully in your spiritual life? (See pages 57-63.)
 - Bible Reading
 - Journaling
 - Prayer
 - Lectio Divina
 - Christian Fellowship
 - Spiritual Direction
 - Spiritual Retreat
3. Complete the following reflection questions.
 - Is there a spiritual practice that God might be calling me to undertake?
 - What are some concrete steps I will need to take to pursue that one thing that is emerging?
 - What obstacles or challenges need to be overcome (e.g., lack of time, others' demands, distracting routines, need for resources, low energy)?
 - What do I sense God is leading me to do next?
4. Take time to prayerfully reflect on the Bible passage.
 - 2 Peter 1:3-11

Chapter 4. Aligning with God

What is God's will to which we must daily submit? God's general will for every Christian is the same; it includes transformation of our hearts, minds, and lives in ways that produce faith, love, and service.

Leadership Practice: Always seek to serve God's purposes first.

Soul Principle: Aligning our will with God's is an all-encompassing ongoing process.

1. Read Chapter 4 in *Spirit-Led Leadership*.
2. Complete the following Journal Reflection Questions.
 - How do I react when my plans are thwarted in some way? (Do I tend to try to make my will happen anyway? Do I pout and sulk? Do I become bitter and distrustful? Am I able to move beyond my disappointment or frustration to look for the opportunity in the unexpected turn of events? Am I able to trust that God is still at work in my life and situation? Am I able to pick myself up and act constructively in faith?)

- How do I tend to respond when others challenge my point of view? (Is it "my way or the highway"? Do I pretend to listen, and then go ahead and do what I was planning to do anyway? Or do I genuinely listen for wisdom and insight, regardless of who the messenger may be? Do I try to get past whatever negative reaction I may have to pick out the jewels from another's words? Am I able to express appreciation for someone's caring enough to challenge me and to engage in problem-solving or envisioning a better future?)
 - How do I pray about my ideas and favorite programs? (Is my heart open to change? Am I open to abandoning favorite programs if need be? Are others (staff members, colleagues) invited to pray with me for God's guidance?)
 - To what extent do I solicit honest input from others about what I am doing and the priorities of my organization or group? Where do I need to include others more in the discernment process of leadership?
 - Where do I need to grow or align my will more thoroughly with God's will?
3. Take time to prayerfully reflect on the Bible passages.
 - Colossians 1:9-10
 - James 1:5-7

Chapter 5. Seeking God Together

Spiritual leaders recognize that the starting place for effective management is consciously rooting all work relationships and processes in rich spiritual soil with the goal of creating a vital spiritual environment throughout the workplace. At its core, this activity fosters faith and a dynamic sense of connection to God in every individual and within work teams and committees.

Leadership Practice: Create a vital spiritual environment within your workplace.

Soul Principle: God works powerfully as we seek his activity among us.

1. Read Chapter 5 in *Spirit-Led Leadership*.
2. How are you using the following practices to help others experience God's presence and activity in every aspect of the organization? How

could you incorporate them more fully in your organizational life? (See pages 118-128)

- Pray together.
 - Actively love your team members.
 - Practice the presence of God in administrative meetings.
 - Hold days of prayer and fasting.
 - Hold extended retreats for staff.
 - Conduct corporate worship with staff.
 - Conduct special programs with a spiritual emphasis.
 - Study the Bible together.
 - Draw others into spiritual leadership.
 - Fully appreciate the gift of administration as a spiritual and pastoral tool.
3. Complete the reflection questions.
 - What has worked best for me to root my leadership practices and work relationships in a rich spiritual soil?
 - What have I learned from not paying attention to the spiritual vitality of those I hire or recruit to work with me?
 - What could I do to create a stronger spiritual environment in my setting?
 - How could I better encourage the spiritual growth of my co-workers and staff?
 4. Take time to prayerfully reflect on the Bible passages.
 - Acts 6:1-6; 13:1-13
 - 1 Corinthians 12:1-7
 - 2 Corinthians 12:9-10
 - Galatians 5:16-25
 - Ephesians 4:30—5:12
 - Philippians 2:1-8

Chapter 6. Embracing Change as a Friend

Change is simply constitutive of living, serving, and growing in every aspect of our life, but until we begin to view change as our friend—as those adjustments and actions that help us to realize our dreams—we will probably keep resisting it.

Leadership Practice: Make change a personal priority.

Soul Principle: Change is our calling.

1. Read Chapter 6 in *Spirit-Led Leadership*.
2. Review how God is calling us to change. What is most important in your life at this time? What

can you grow in these practices? (See pages 139-148)

- We are called to faith and repentance.
 - We are called to servant leadership.
 - God's already helping.
 - Try slowing down.
 - Prayer helps.
3. Complete the reflection questions.
 - When I think of a time when I (almost) experienced "slow death" as a result of a lack of alignment between my inner self and outer world, what made it hard for me to listen and respond to my inner voice's call for change.
 - What can I do to "break the logic of task pursuit" (the routine pattern of my life and work) to set aside some time to reflect, pray, listen, and summon the courage to change?
 - What change is God producing in me right now or calling me to that requires my eager engagement and cooperation?
 - What do I imagine will have to take place in my life to free me to pursue one important vision of dream I have in my heart?
 4. Take time to prayerfully reflect on the Bible passages.
 - Mark 10:45
 - John 3:16; 5:24
 - Romans 3:21-24; 5:1-6; 8:5-11; 12:1-2
 - Philippians 1:6; 2:12
 - Colossians 1:9-12
 - Titus 2:11-14

Chapter 7. Listening Well

The more we value and trust the Holy Spirit's working in the lives of the whole team, the more we will listen for what the Spirit is saying through team members, and the more we will use their gifts for the benefit of the whole organization.

Leadership Practice: Lead by listening well.

Soul Principle: The Holy Spirit speaks and works through every team member.

1. Read Chapter 7 in *Spirit-Led Leadership*.
2. How can you utilize the three essential practices for creating a good listening environment to improve communication with your team? (See pages 168-171)
 - Create an atmosphere of trust and safety.

- Create and work a process to listen and decide.
 - Be careful not to overreact or react prematurely.
3. Complete the reflection questions.
 - What troubling tensions exist because of lack of either communication or mutual understanding between my co-workers or staff and me?
 - What do I need to learn to become a more effective listener?
 - What message has my organization or co-workers been trying to get me to hear that I dare not ignore any longer?
 4. Take time to prayerfully reflect on the Bible passages.
 - 1 Corinthians 12
 - Philippians 2:3-8

Chapter 8. Trusting God

Trust is continuing to believe that God is present and at work in our organization, even if we cannot discern how at the moment. As spiritual leaders committed to trusting God always, we continue to work faithfully, to seek wisdom, and to make whatever hard decisions are needed. But we also continue to rest in the unbreakable bond of our love relationship with God and in God's sovereign activity to accomplish his good, pleasing and acceptable will (Rom 12:2).

Leadership Practice: Always trust God.

Soul Principle: Steadfast trust in God is indispensable to spiritual vitality and leadership.

1. Read Chapter 8 in *Spirit-Led Leadership*.
2. How can you live an attitude of trust in God from which you can offer strong, solid leadership. Reflect on each of the following guidelines and expectations for the person of faith, based on the teaching of Scripture. Where do you need to grow? How will you do it. (See pages 184-190)
 - Remember your limited ability to understand the will and ways of God.
 - Expect God to be at work in your life and leadership, leading and guiding you.
 - Expect God to build character and faith out of your experiences of suffering.
 - Take encouragement from opportunities to share in the sufferings of Christ.

- Cling to Jesus Christ, who will never let you go.
5. Complete the reflection questions.
 - What issue do I need to resolve with God emotionally so that I can get back on track with living and leading from a place of trust?
 - Where will I go for help to work through my faith issues?
 - What teaching of Scripture do I need to remember and cling to in my darkest moments of doubt, fear, or suffering?
 - What language do my leadership team and I need to adopt to communicate more clearly our faith and commitment always to trust God?
 6. Take time to prayerfully reflect on the Bible passages.
 - Psalm 23; 42:5-6; 56:3-4
 - Proverbs 3:5-6
 - Isaiah 55:8-9
 - Jeremiah 17:28
 - Romans 5:3-5; 8:28-39; 12:2
 - John 14:1
 - Hebrews 6:13-15; 11:1
 - James 1:5-6
 - 1 Peter 1:6-9

Chapter 9. The Heart of Spiritual Leadership

The more we experience grace, mercy, and acceptance from God, the more we will be prepared to offer these same gifts to others and to promote an atmosphere of grace. The more we believe with heartfelt conviction that our worth is based on God's love and forgiveness, the more we will be ready to love and value our co-workers without judgment or condescension. As others experience grace from us, they will have more joy and will trust more in the goodness of God.

Leadership Practice: Open yourself fully to the love and grace of God.

Soul Principle: The grace of God creates the only sure foundation for personal transformation and dynamic spiritual leadership.

1. Read Chapter 9 in *Spirit-Led Leadership*.
2. How can you become a "grace-full" spiritual leader?
 - In short, the best help we have to experience the love and grace of God and to become

“grace-full” spiritual leaders is God. Our part is to seek God diligently, and God’s part is nothing less than to give us the Holy Spirit. The more we learn to live by the Holy Spirit—cultivating a deeper spiritual life, practicing spiritual disciplines, aligning with God’s purposes, seeking to create a vital spiritual environment in our workplace, obeying the promptings when called to change, listening to God’s voice in one another, trusting God always, and letting the grace of God transform us and the way we treat others—the more Spirit-filled our life and leadership will be.

3. Complete the reflection questions.
 - In the quietness of this moment, open your heart and mind to God. Thank God for whatever he has shown you through your reading and reflection on the wisdom of the *Spirit-Led Leader*—insights that may help

you deepen your own spiritual life. Thank God for his grace, mercy, and work in your life and leadership through the hard times as well as the easier times.

- Ask for help to trust, to believe in your heart that God is your friend, has your best interests in mind, and is present and active in your life. Ask God for eyes to see what you need to see, for courage to face the truth, and for strength to act on what God reveals.
4. Take time to prayerfully reflect on the Bible passages.
 - Ephesians 2:8-9
 - 1 Peter 1:3-6, 8-9
 - Titus 2:11-14
 - 2 Timothy 1:11-12
 - Hebrews 4:16; 11:6
 - Romans 1:16-17; 8:5-6
 - Philippians 3:8-12
 - 2 Corinthians 12:9-10

Integrating Your Spiritual Life and Leadership

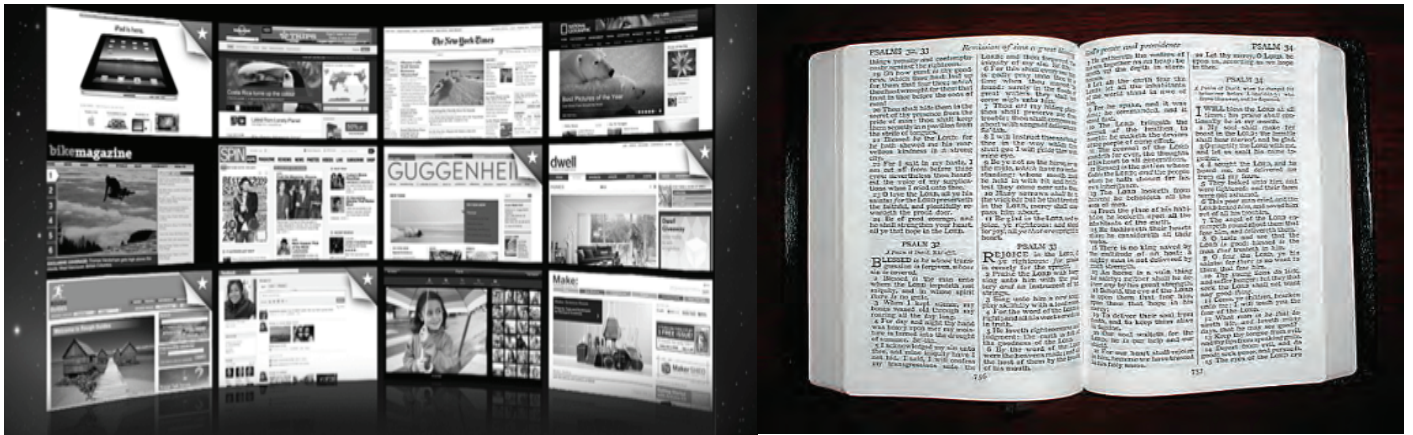
Review your reflections from the study guide and create a plan to more fully integrate your spiritual life with your leadership using the following questions.

- **What are the specific ways you can apply the wisdom of *The Spirit-Led Leader* to your spiritual life and your leadership? List 5 specific ways.**

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

- **Which areas do you need to develop at this time?**

- Practicing the presence of God in your live (Chapter 2)
- Practicing the spiritual disciplines (Chapter 3)
- Serving God’s purposes and will, not my own (Chapter 4)
- Applying spiritual practices to organizational life (Chapter 5)
- Embracing the practices of change (Chapter 6)
- Practicing good listening and creating a good listening environment (Chapter 7)
- Deepening an attitude of trust in God as the foundation for leadership (Chapter 8)
- Other areas:



Becoming a Faith Formation Curator

John Roberto

We live surrounded by an abundance of content. Just imagine how many blogs are written and published daily (there over 150 million blogs), how many websites add significant content each (we've stopped counting the number of websites), how many courses are now available online (MIT has over 1600 courses online), and how many videos are uploaded to YouTube (actually 20 hours of video every minute). Many experts estimate that all of the information on the Internet is doubling every 72 hours. As author Clay Shirky says we are shifting from an era of content scarcity to one of content abundance.

A lot of this content is religious content—Bible studies, prayer and spiritual practices, daily devotions, online courses, to name only a few examples. And this is only the online content! Think of all the religious content created each day by religious publishers and organizations, seminaries and universities, congregations, and individuals.

In this world of content abundance it becomes possible for a congregation to provide faith formation for everyone, anytime, anywhere, 24x7x365. It is now possible to customize and personalize faith formation around the life tasks and issues, and religious and spiritual needs and interests of people of all ages. It is now possible to offer a wide variety of programs, activities, and resources that incorporate a variety of ways to learn—on your own, at home, in small groups, in large groups, in the congregation, in the community and world—in a blended approach to faith formation integrating physical gathered settings and virtual online settings.

To make this vision of a “lifelong network” of religious content and experiences a reality, the role of the leader in faith formation is shifting from *providing* religious content and programming to *curating* religious content and experiences for all ages. We are all familiar with curating and curation—museum curators collect art and artifacts and identify the most relevant or important to be displayed in an exhibit for the public. Museum curators are subject-matter experts that guide an organization’s overall art collection.

A content curator is someone who continually finds, groups, organizes, and shares the best and most relevant content on a specific subject to match the needs of a specific audience. Content curators can provide a personalized, qualified selection of the best and most relevant content and resources available. They do not create more content, but make sense of all the content that others are creating. Curation is an evolving idea that addresses two parallel trends: the explosive growth in information, and our need to be able to find information in coherent, reasonably contextual groupings.

John Roberto is editor of Lifelong Faith and author of *Faith Formation 2020: Designing the Future of Faith Formation* (LifelongFaith Associates).

In *Curation Nation*, Steven Rosenbaum describes how curation is both an old and new concept.

In the past we lived in a world of disciplines. The senior editorial leadership at magazines were known as editors. The folks who chose which TV shows played on a TV network were programmers. The people who picked which things would be on the shelves of your local stores were retailers. Each of these professions involved choosing the right things, putting them in the proper order, and creating a collection that was appealing to an audience or consumer. Oh, and there was that rarified individual who selected objects of art to present in a museum or gallery: they were called curators.

Today, curation is the coin of the realm. Film Festivals curate their program. Web sites curate their editorial. The team at the shopping site Gilt Group curates the items it offer for sale. *Curation* was once a word that seemed to mean highbrow, expensive, out of reach of mere mortals. But today museum curators must compete with media curation at Newser, collections of handmade crafts at Etsy, or the curated collection of the best roll-on luggage at Squidoo. Certainly curation means quality, but now quality is in the eye of the beholder. (Rosenbaum, 3)

Content Curation in Practice

The best way to understand content curation and what it produces is to see it in practice. Visit the following websites for a view of content curation and how content is identified, organized (described and presented), and delivered (published).

- The **NYTimes.com Topics** employs content managers who sift through *The Times*' archive to create new meaning by grouping articles and resources that were filed away (or distributed to library databases). The site also produces exceptional multimedia pieces akin to "special exhibitions," which offer a documentary and reflective aspect to news content. Each topic page collects all the news, reference and archival information, photos, graphics, audio and video files published on that topic This treasure trove

is available without charge on articles going back to 1981. Visit the *New York Times* website: <http://topics.nytimes.com/topics/reference/time-stops>.

- **Hulu** is an online video service that takes videos sourced from multiple networks and then rearranges them into collections that give a new perspective to the collection as a whole. Hulu's mission is to help people find and enjoy the world's premium video content when, where and how they want it. Hulu brings together a large selection of videos from over 260 content companies. Visit their website: www.hulu.com
- **NPR Music** celebrates great music in every genre and is an industry leader in music discovery. The multimedia site offers more than 300 new features monthly and an extensive archive, in collaboration with NPR's newsmagazines, 12 public radio member stations and the passionate NPR community. NPR Music creates and distributes inventive music coverage across multiple platforms—from web, to radio, to podcast, to mobile, to social media, to live events—with first-listens to new albums, live performances, concerts at the Tiny Desk, interviews, reviews and blogs. Its newest addition: All Songs 24/7, a non-stop stream of every song ever played in 10 years of the show. Visit the NPR website: www.npr.org/music.
- **Patheos** is the online site to engage in the global dialogue about religion and spirituality and to explore and experience the world's beliefs. Patheos is the website of choice for people looking for credible and balanced information or resources about religion. Patheos brings together the public, academia, and faith leaders in a single environment, and is the place where people turn on a regular basis for insight into questions, issues, and discussions. Patheos is designed to serve as a resource for those looking to learn more about different belief systems, as well as participate in productive, moderated discussions on some of today's most talked about and debated topics. Visit the Patheos website at: www.patheos.com.
- **Faith and Leadership**, sponsored by Duke University Divinity School, incorporates a website with print, audio, and video resources; a

daily e-newsletter; and blogs with a diversity of nationally recognized bloggers (*Call and Response*) designed for Christian leaders to reflect, connect, learn, read, discuss, and imagine. The team at *Faith and Leadership* creates new content and makes available existing content from a wide variety of sources relevant for Christian leaders. Visit their website at: www.faithandleadership.com.

- **Ministry Matters**, developed by the United Methodist Publishing House, is designed as a community of resources for church leaders—a place to brainstorm, research, and plan; a place to collaborate with colleagues across the office or across the country; a place to connect with others with the same responsibilities and concerns, hopes and dreams. Users of the site can do sermon research with the Bible commentaries, find the perfect video to discuss with a class, select prayers and music for a transformative worship experience, listen to an inspiring sermon, read an invigorating leadership article, or chat with other leaders about what’s keeping you up at night. Visit their website at www.ministrymatters.com

Shifting from “One Size Fits All” to Personalized & Customized Faith Formation

With both an increasing diversity of religious and spiritual needs across all ages and generations *and* an abundance of faith formation resources, faith formation leaders in churches will increasingly need to become *content* and *experience curators*.

Faith formation is no longer about offering “one size fits all” curriculum or programming for a whole age group or generation—assuming that everyone is at the same point in their spiritual and religious growth. Churches can now meet people at the point of their spiritual, religious, and learning needs and offer personalized opportunities for faith growth. Today, as never before, churches have access to faith formation programming, activities, and resources that can be personalized and customized to address the diversity of people’s religious and spiritual needs. The new reality is that churches can offer activities that cater to niches— individuals, families, and small groups with a particular spiritual or

religious need, interest, passion, concern, or life issue.

As religious content and experience curators, faith formation leaders will become less focused on providing “one size fits all” curriculum for people, *and* become more focused on addressing people’s spiritual and religious growth by offering a wide *variety* of religious content and experiences. In the education world this is known as differentiated instruction—focusing education around the learning needs of the students. We might call this approach *differentiated faith formation*.

Churches will be able to offer faith formation in a variety of models, providing a variety of ways for people to learn and grow in faith that respects their preferred styles of learning, their life situations, and their time constraints. For example:

- *Faith Formation on Your Own*: reading, online courses, audio and video programs, movies, television programs
- *Faith Formation at Home*: Bible reading, storytelling and caring conversation, prayer and devotions, rituals and traditions, service
- *Faith Formation in Small Groups*: Bible and theology study groups, social issues study groups, faith sharing groups, lectionary-based groups, service/mission action groups, support groups, special interest groups
- *Faith Formation in Large Groups*: courses, speaker series, workshops, film festivals, retreats, conferences, intergenerational programs
- *Faith Formation in the Congregation*: Sunday worship, church year events and celebrations, service/mission activities, ministry and leadership in the church and community
- *Faith Formation in the Community and World*: programs, courses, clinics, workshops, and presentations at universities, retreat centers, YMCAs, libraries, bookstores, regional church programs; through engagement in community action, and local and global service and justice projects

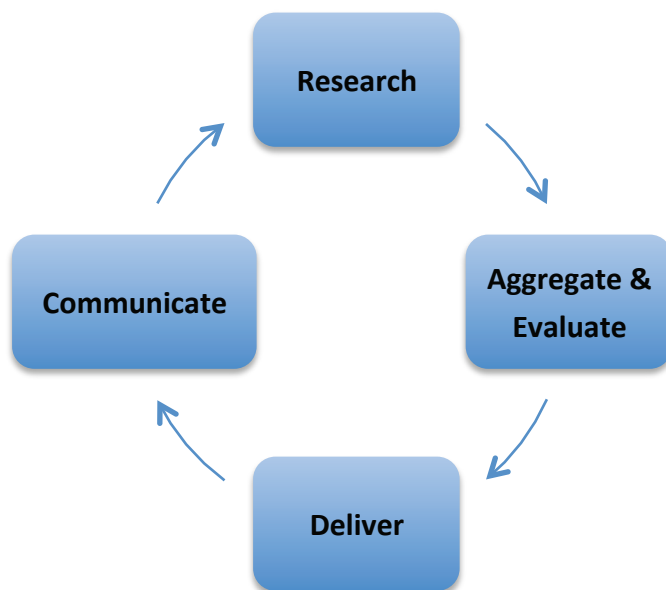
Faith formation can take place in physical places and virtual spaces (online). Online websites, social networking services, and digital technologies (iPod Touch, smart cell phones, iPad) mean that churches can deliver faith formation experiences and

resources anytime and anywhere, reaching people wherever they go online (home, work, school, vacation, coffee house).

The emerging role of the *faith formation curator* is to research a wider variety of content and experiences available from a great diversity of sources, assess and evaluate its quality and appropriateness, organize the content, and then make available the content and experiences to people (delivery).

Curating Religious Content

How does content curation work? Just as librarians help us make sense of the overwhelming number of books and periodicals available in a library, content curators identify, organize, and share information that will be most relevant to their prospects. Each of the following elements of curating religious content are year-round tasks. The process of curating is continual.



1. Research Resources & Stay Up-to-Date

The best librarians have access to hundreds, if not thousands, of information resources that deliver ongoing, real-time information on specific topics of interest to information patrons. Faith formation curators will need to develop sources they can trust for high quality religious content and experiences.

Consider the following sources for uncovering faith formation programs, activities, and resources.

- **People Resources:** Research the people resources in your church, community, church agencies, colleges and seminaries, church-related organizations, and so on. Consider people who teach courses or specialized programs, guest presenters on specialized topics, leaders for small groups and Bible studies, prayer guides/spiritual directors, leaders for service/mission programs, and so on. Develop a list of people resources and the knowledge and skills they offer.
- **Faith Formation Programs and Activities in Physical Places:** Research programs and activities within your own congregation, in the surrounding religious congregations, church agencies, religious organizations, retreat and conference centers, religious camps, colleges and universities. Develop a list of the resources, indicating the faith formation model(s) used in each program or activity: on your own, at home, in small groups, in large groups, in the congregation, and/or in the community and world.
- **Faith Formation Print and Media Publications:** Research print and media publications from publishers and religious organizations. Use print catalogs and websites to develop a list of relevant print and media resources.
- **Faith Formation Programs, Activities, and Resources in Virtual Places (Online):** Research online faith formation programs, activities, social networks, and resources that address spiritual and religious needs. Consider online sources such as: *books* (see Google Books), *courses* and *podcasts* (see iTunes University), *videos* (see YouTube and God Tube), *age-specific sites* (see Busted Halo, Kids Spirit Online), *small group studies* (see The Thoughtful Christian), *multi-faceted religious content* (see Patheos), and so much more. These types of online programs, activities, and resources can become an integral element of learning programs and faith formation offerings for all ages and for

families. Research the online resources of your own denomination or religious tradition, and online courses and webinars offered by colleges, universities, seminaries, and religious organizations. Develop a list of online resources, programs, and activities.

Develop ways to stay informed on the latest resources as they become available, for example joining mailing lists (email or RSS feeds) or the Facebook pages and websites of publishers, colleges/seminaries, religious and community organizations, and online resource centers so that you receive regular updates on the publication and dissemination of new resources.

2. Aggregate & Evaluate

Aggregation is the act of bringing together the most relevant religious content and experiences on a particular topic or religious/spiritual need into a single location, such as a website or blog or printed catalog. Religious content and experiences can be aggregated in a variety of ways such as 1) topically (Bible, theological themes), 2) age-appropriate faith formation themes and life issues, 3) milestones and life transitions, 4) individual Christian practices, 5) social justice issues, and so on. There are dozens of ways to aggregate content to address people's spiritual and religious needs.

Librarians must consume and curate information in order to interpret and best understand how it addresses their patrons' information needs. Expert librarians can quickly process hundreds of documents daily, using tools that organize and automatically tag content, deliver summaries, and rank content as needed.

Faith formation curators find the best resources to address a target audience or particular spiritual or religious needs. They develop standards for evaluating faith formation activities and resources, such as biblical and theological content, developmental appropriateness, ethnic-cultural responsiveness, ease-of-use, quality of learning experience, and so on.

Faith formation curators highlight the relationship between the content and the spiritual and religious needs of people so they can see how it addresses their particular spiritual or religious needs, interests, passions, concerns, or life issues.

3. Deliver

Faith formation curators now have available an array of delivery systems for providing religious content and experiences to people. Today's digital and online technologies make it possible to deliver content via websites, blogs, iPods, iPads, iPhones and smart phones. The extended faith formation models make it possible to deliver the content in different formats: on your own, at home, in small groups, in large groups, in the congregation, and in the community and world. ***Faith formation curators can literally provide faith formation for everyone, anytime, anywhere, 24x7x365.***

One of the best ways to connect people with religious content and experiences (in physical and virtual settings) is via an online center at your church's website or on a new dedicate website or on social networking platform.

Even if a congregation is not able to incorporate an online faith formation center into an existing website, faith formation curators can create a new, dedicated website for faith formation using a service such as Weebly which even provides free hosting and tools for creating a website (see www.weebly.com) or use a social networking platform like Ning (www.ning.com) which has a low annual fee.

A church can also create an annual or seasonal faith formation catalog in print format. The catalog includes descriptions for every faith formation activity (in physical settings or online), indicating clearly the content or focus of the program and the particulars, such as date, location, cost, time, website location, and so on. Ginghamburg Church develops seasonal catalogs for children, youth, adults, and service/mission programs. Visit their website at: <http://ginghamsburg.org>. Holy Infant Catholic Church develops an annual faith formation catalog with offerings for all ages. Visit their website and search for their faith formation handbook at: www.holyinfantchurch.org.

4. Communicate

Develop a communications/marketing plan to keep people continually informed of all of the faith formation content and experiences offered by your congregation. Keep in mind a few key insights about communication.

- Demonstrate how the faith formation offerings respond to something within the lives of people. Connect to their religious and spiritual needs, interests, passions, and so on.
- Describe the 2-3 benefits of participating in faith formation?
- Get people's attention by connecting to things that interest people.
- Explain how people can access the resources.

- Use lots of approaches to communicate: print catalog, brochures, church website, online ads, e-newsletter, email, Facebook page, Twitter messages, and so on.

Works Cited

Rosenbaum, Steven. *Curation Nation: Why the Future of Content is Context*. New York: McGraw Hill, 2011.

Curating Spiritual Formation

These are examples of existing resources organized in a variety of models, in physical and virtual settings, for age groups, families, and all generations.

On Your Own

- Daily prayer online and on mobile devices: www.sacredspace.ie, www.taize.fr, www.upperroom.org, www.loyolapress.com
- Fixed hour prayer online: www.explorefaith.org/prayer/fixed/hours.php
- Spiritual guides and mentors (drawn from congregation and prepared for their role)
- Spiritual reading: a list of recommended books on the church website
- Spiritual podcasts: "Soul Care" by author Mindy Caliguire (www.youtube.com/watch?v=BCepcaOFWJo)
- Online retreat: A Thirty-Four Week Retreat for Everyday Life (Creighton University, <http://onlineministries.creighton.edu/CollaborativeMinistry/cmo-retreat.html>)
- Online spirituality course: forty-day retreats with spiritual guides like Thomas Merton, Joyce Rupp, Henri Nouwen, and Joan Chittister (www.SpiritualityandPractice.com)

At Home

- Daily family prayer resources (online and print)
- Liturgical year prayers and celebrations for the home
- Prayers for milestones and life transitions

In Small Groups

- Prayer groups: age-specific, multigenerational, and family or parent prayer groups

- Spiritual formation course: *Companions in Christ: A Small-Group Experience in Spiritual Formation* (adults), *The Way of Pilgrimage* (youth), and *Companions in Christ: The Way of the Child* (children) (Upper Room, www.companionsinchrist.org)
- Spiritual book clubs: monthly meetings (physical or online) to discuss the book-of-the-month

In Large Groups

- Intergenerational learning programs on prayer: monthly sessions for all ages on prayer practices
- Retreat experiences (for age groups, families, or multiple generations) at church or a retreat center
- Workshops and courses on the spiritual disciplines: lectio divina, silence, contemplation, the Examen, meditation, spiritual reading, fixed hour prayer, etc.
- Monastery trip to experience monastic life and prayer

In the Congregation

- Church-wide retreat experience
- Prayer room with resources for prayer and spiritual practices
- Prayer through the year: liturgical seasons, devotions, and celebrations

In the Community & World

- Prayer experiences and programs in other congregations
- Courses and programs at colleges, seminaries, retreat centers
- Interfaith prayer experiences and programs



Becoming an Adaptive Leader

Based on the work of Ronald Heifetz and Marty Linsky

A *adaptive leadership is the activity of mobilizing people to tackle tough challenges and thrive. The concept of thriving is drawn from evolutionary biology, in which a successful adaptation has three characteristics: (1) it preserves the DNA essential for the species' continued survival; (2) it discards (reregulates or rearranges) the DNA that no longer serves the species' current needs; and (3) it creates DNA arrangements that give the species' the ability to flourish in new ways and in more challenge environments. Successful adaptations enable a living system to take the best from its history into the future.*

What does this suggest as an analogy for adaptive leadership?

1. *Adaptive leadership is specifically about change than enables the capacity to thrive. New environments and new dreams demand new strategies and abilities, as well as the leadership to mobilize them. As in evolution, these new combinations and variations help organizations thrive under challenging circumstances rather than perish, regress, or contract. Leadership, then, must wrestle with normative questions of value, purpose, and process. What does thriving mean for organizations operating in any particular context?*
2. *Successful adaptive changes build on the past rather than jettison it. In biological adaptations, though DNA changes may radically expand the species' capacity to thrive, the actual amount of DNA that changes is miniscule. A challenge for adaptive leadership, then, is to engage people in distinguishing what is essential to preserve in their organization's heritage from what is expendable. Successful adaptations are thus both conservative and progressive. They make the best possible use of previous wisdom and know-how. The most effective leadership anchors change in the values, competencies, and strategic orientations that should endure in the organization.*
3. *Organizational adaptation occurs through experimentation. Those seeking to lead adaptive change need an experimental mind-set. They must learn to improvise as they go, buying time and resources*

Ronald Heifetz is the King Hussein bin Talal senior lecturer in public leadership and founder of the Center for Public Leadership at Harvard University, and the author of *Leadership without Easy Answers* (Harvard Business Press, 1998). **Marty Linsky** is adjunct lecturer in public policy at the Center for Public Leadership at Harvard University. Heifetz and Linsky have co-authored two books: *Leadership on the Line* (Harvard Business Press, 2002), and *The Practice of Adaptive Leadership* (Harvard Business Press, 2009).

along the way for the next set of experiments. For example, companies must often be willing to lose money in failures until they bring a successful product to market.

4. *Adaptation relies on diversity.* By diversifying the gene pool, nature markedly increases the odds that *some* members of the species will have the ability to survive in a changing ecosystem. The secret of evolution is variation, which in organizational terms could be called distributed or collective intelligence. For an organization, adaptive leadership would build a culture that values diverse views and relies less on central planning and the genius of the few at the top, where the odds of adaptive success go down.
5. *New adaptations significantly displace, reregulate, and rearrange some old DNA.* By analogy, leadership on adaptive challenges generates loss. Learning is often painful. One person's innovation can cause another person to feel incompetent, betrayed, or irrelevant. Not many people like to be "rearranged." Leadership therefore requires the diagnostic ability to recognize those losses and the predictable defensive patterns of response that operate at the individual and systemic levels. It also requires know-how to counteract these patterns.
6. *Adaptation takes time.* Most biological adaptations that greatly enhance a species' capacity to thrive unfold over thousands, even millions of years. In organizations, it takes time to consolidate adaptations into new sets of norms and processes. Adaptive leadership thus requires persistence. Significant change is the product of incremental experiments that build up over time. And cultures change slowly. Those who practice this form of leadership need to stay in the game, even while taking the heat along the way.

Mobilizing people to meet their immediate adaptive challenges lies at the heart of leadership in the short term. Over time, these and other culture-shaping efforts build an organization's adaptive capacity,

fostering processes that will generate new norms that enable the organization to meet the ongoing stream of adaptive challenges posed by a world every ready to offer new realities, opportunities, and pressures.

(Source: *The Practice of Adaptive Leadership*, pages 14-17)

Distinguishing Technical Problems from Adaptive Challenges

Adaptive leadership is the activity of mobilizing people to tackle the toughest problems and do the adaptive work necessary to achieve progress.

Leadership would be an easy and safe undertaking if organizations and communities only faced problems for which they already knew the solutions. Everyday, people have problems for which they do, in fact, have the necessary know-how and procedures—what leadership experts Ronald Heifetz and Marty Linsky call *technical problems*. But there are also a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides answers from on high. Heifetz and Linsky refer to these problems as *adaptive challenges* because they require experiments, new discoveries, and adjustments from numerous places in the organization or community. Without learning new ways—changing attitudes, values, and deep-seated behaviors—people cannot make the adaptive leap necessary to thrive in the new environment. The sustainability of real change depends on having the people with the problem internalize the change itself.

Sharon Daloz Parks, in *Leadership Can Be Taught*, describes the distinction between technical and adaptive issues in this way:

Technical problems (even though they may be complex) can be solved with knowledge and procedures already in hand. In contrast, *adaptive challenges* require new learning, innovation, and new patterns of behavior. In this view, leadership is the activity of mobilizing people to address adaptive challenges—those challenges that cannot be resolved by expert knowledge

and routine management alone. Adaptive challenges often appear as swamp issues—tangled, complex problems composed of multiple systems that resist technical analysis and thus stand in contrast to the high, hard ground issues that are easier to address but where less is at stake for the organization or the society. They ask for more than changes in routine or mere performance. They call for changes of heart and mind—the transformation of long-standing habits and deeply held assumptions and values. (Parks, 10)

Distinguishing Technical Problems and Adaptive Challenges

Kind of Challenge	Problem Definition	Solution	Locus of Work
Technical	Clear	Clear	Authority
Technical & Adaptive	Clear	Requires Learning	Authority & Stakeholders
Adaptive	Requires Learning	Requires Learning	Stakeholders

Technical problems are well defined: Their solutions are known and those with adequate expertise and organizational capacity can solve them. For example, a church that sees the participation of children and their families decline in the summer, can develop a multi-week vacation Bible school program that engages children and their parents during the summer months. It is a technical problem because the resources are available for purchase and the implementation tasks, while requiring plenty of work, are well known and within the existing skill-set of the church’s faith formation leadership.

Adaptive challenges are entirely different. The challenge is complex and not so well defined; and the answers are not known in advance. Adaptive challenges require innovation and learning. For example, developing a plan for the faith formation of Baby Boomers in a church is an adaptive challenge today. People in this generation present a whole new set of challenges and opportunities for churches. They bring new spiritual and religious needs, and are creating a new “stage of life” that combines work, retirement, volunteerism, and family. There

are few established models or resources for faith formation with this generation. This adaptive challenge will require creating new models and approaches, experimenting, evaluating, redesigning, and continuous learning.

In the view of Heifetz and Linsky, leadership is mobilizing a congregation to engage its own most pressing problems and deepest challenges. Leadership builds capacity and sustainability within a congregation as it mobilizes a congregation to engage and make progress on its deepest challenges. Leaders help people understand the changed nature of their situation, and develop new ways of doing faith formation and being church. Mobilizing people for adaptive work is to help them enter into that zone of risk where new learning and new self-understanding, as well as new ways of acting, can be discerned.

What Heifetz describes as adaptive work is, at its heart, spiritual work. It involves the central dynamics of the spiritual life and of transformation, which includes loss, risk and trust, even death and resurrection. Our sacred Scriptures, sacraments and our symbols are all powerful resources for adaptive challenges and adaptive work that we face at this time. No program, effort at restructuring, or ‘right’ pastor alone will meet this challenge. It involves our own changes of minds and hearts. (Robinson, 45)

Moses and Adaptive Leadership

Anthony Robinson in *Leadership for Vital Congregations* presents Moses as an excellent illustration of adaptive work and leadership.

Moses, who over the long stretch of the Exodus and wilderness journey engaged in helping former slaves make the transition from one reality, slavery, to a new and different one, freedom lived in covenant with Yahweh. As the author of the First Letter of Peter would later put it, “Once you were not a people, but now you are God’s people” (1 Peter 2:10). But this change is a long and labored one, filled with difficult learning for all concerned. And even if Moses was granted some rather impressive technical moves, like a staff transformed from wood to snake with a simple toss, in the end of the work

of this transformation is adaptive work which the people themselves must do.

Time and again, during the years of the wilderness sojourn Moses was confronted by those who wanted a quick fix, a technical solution. “Give us bread,” they demanded. Manna was provided, but the gift of manna only points to a deeper source of provision and to the new reality that is emerging, the reality of living in a trusting relationship with God. As in adaptive work, the problem or challenge that Moses and the people faced was not clearly known or defined at the outset. It was much more than making it through the Red Sea and gaining freedom from Egypt. That was the “freedom from” aspect of the story. But that story was followed by the “freedom for” element. To discern what they were free for required learning and change of hearts and minds. Nor was there any readily apparent or clearly applicable solution for this huge adaptive challenge. The solution, such as it was, required making the journey, living into the new reality of God’s faithful people in the midst of an uncertain solution. Heifetz describes the leader’s task as ‘mobilizing adaptive work.’ Moses mobilized adaptive work in a most literal way, leading people on a journey of learning and transformation. (Robinson, 44)

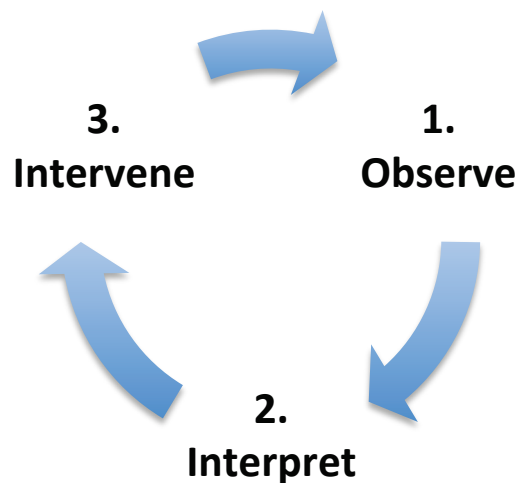
Seven Ways to Know if You Are Facing an Adaptive Challenge

1. If the solution requires operating in a different way than you do now. . . you may be facing an adaptive challenge.
2. If the problem AND the solution require learning. . . you may be facing an adaptive challenge.
3. If the solution requires shifting the authority and responsibility to the people who are actually affected. . . you may be facing an adaptive challenge.
4. If the solution requires some sacrifice of your past ways of working or living. . . you may be facing an adaptive challenge.
5. If the solution requires experimenting before you’re sure of the answer. . . you may be facing an adaptive challenge.

6. If the solution will take a long time. . . you may be facing an adaptive challenge.
 7. If the challenge connects to people’s deeply held values. . . you may be facing an adaptive challenge.
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The Process of Adaptive Leadership

Adaptive leadership is an iterative process involving three key activities: (1) *observing* events and patterns around you; (2) *interpreting* what you are observing—developing multiple hypotheses about what is really going on; and (3) *designing* interventions based on the observations and interpretations to address the adaptive challenge you have identified. Each of these activities builds on the ones that come before it; and the process overall is iterative: you repeatedly refine your observations, interpretations, and interventions.



One of the tendencies in organizations is that leaders feel pressure to solve problems quickly, to move to action. So they minimize the time spent in diagnosis, collecting data, exploring multiple interpretations of the situation, and alternative potential interventions. To diagnose an organization while in the midst of action requires the ability to achieve some distance from the “on-the-ground” events. Heifetz and Linsky use the metaphor of “getting on the balcony” above the “dance floor” to depict what it means to gain the distanced perspective necessary to see what is really happening. When a leader can move back and forth between balcony and dance floor, he or she can

continually assess what is happening in the organization and take corrective action. When leaders perfect this skill, they are able to simultaneously keep one eye on the events happening immediately around them and the other eye on the larger patterns and dynamics.

A second tendency is that people begin analyzing the problem by personalizing them (“If only this person was a better leader...”) or attributing the situation to interpersonal conflict (“these two people don’t work well because their work styles are so at odds”). This tendency often obscures a deeper, more systemic (and perhaps more threatening) understanding of the situation, for example conflict between two people can be structural, not personal, even if it’s taken on a personal tone. To counteract the personalization of problems start with diagnosing and acting on the system (“moving outside in”) and then do the same for the self (“moving inside out”).

Designing Effective Interventions

Effective interventions mobilize people to take an adaptive challenge. Here is a checklist, a series of practices that can make your interventions more effective. They are presented as they might be employed more or less sequentially, but you can think of them as individual practices as well.

Step 1. Get on the Balcony

Observe what is going on around you. Stay diagnostic even as you take action. Develop more than one interpretation. Watch for patterns. Reality test your interpretations when it is self-serving or close to your default. Debrief with partners as often as you can to assess the information generated by your actions, and the interventions of others, in order to think through your next move.

Step 2. Determine the Ripeness of the Issue in the System

How resilient and ready are people to tackle the issue? An issue is ripe when the urgency to deal with it has become generalized across the organization. If only a subgroup or faction cares passionately, but

most other groups in the system have other priorities on their mind, then the issue is not yet ripe.

The ripeness of an issue, then, is a critical factor in planning a strategy of intervention. Is the urgency localized in one subgroup and not yet widespread across the larger organization? Or, on the other hand, are people avoiding the hard work of dealing with the adaptive challenge at hand because the pain of doing so has reached too-high levels of disequilibrium? Is the prevailing momentum to treat the situation as a technical problem or an adaptive challenge? Your answer to these questions will affect how you frame your intervention strategy and the timing of your actions.

Step 3. Ask, Who Am I in This Picture?

How are you experienced by the various groups and subgroups? What role do you play in them? What perspectives on the adaptive issues do you embody for them? Because they are comfortable with the way you usually act, they are probably quite proficient at managing you in that role to ensure that you do not disturb their equilibrium.

Consistency is a high value in management but a significant constraint in leading adaptive change.

You will have to be less predictable than usual to get constructive attention and make progress on an adaptive issue.

Step 4. Think Hard About Your Framing

Thoughtful framing means communicating your intervention in a way that enables group members to understand what you have in mind, why the intervention is important, and how they can help carry it out. A well-framed intervention strikes a chord in people, speaking to their hopes and fears. That is, it starts where they are, not where you are. And it inspires them to move forward.

Think about the balance between reaching people above and below the neck. Some groups and some people need data first, before the emotion. For others, it is the reverse. Connect your language to the group’s espoused values and purpose. Consider the balance between strong attention-getting

language and language that is loaded as to trigger flight-or-fight responses rather than engagement.

Step 5. Hold Steady

When you have made an intervention, think of it as having a life of its own. Do not chase after it. The idea will make its way through the system, and people will need time to digest it, think about it, discuss it, and modify it. If you think of it as “yours,” you are likely to get overly invested in your own image of it.

Once you have made an intervention, your idea is theirs. You cannot control what people do with your intervention. So as this process unfolds, resist the impulse to keep jumping in. Let people work with your idea. Listen closely to how various subgroups are responding to your ideas, so you can calibrate your next move. Watch for the ways and the elements of it that are taking hold. Watch for avoidance mechanisms, like an immediate rejection or silence.

Your silence is a form of intervention. It creates a vacuum for others to fill. The key is to stay present and keep listening.

Holding steady is a poised and listening response. People will appreciate, even if they never say so, the patience and respect it shows.

Step 6. Analyze the Factions That Begin to Emerge

As people in your own close-in group begin to discuss your intervention, pay attention to who seems engaged, who starts using your language or pieces of your idea as if it were their own. Listen for who resists the idea. Use these observations to help you see the contours of the factions that various people represent on the issue. Faction mapping of your close-in group will give you valuable information about the ways the larger system of people will deal with the issue, which is critically important because refining and implementing your change initiative will usually require the involvement of people from the larger system.

Step 7. Keep the Work at the Center of People’s Attention

Avoiding adaptive work is a common human response to the prospect of loss. Avoidance is not shameful; it is just human.

Expect that your team will find ways to avoid focusing on the adaptive challenge in doing their diagnosis as well as in taking action. Resistance to your intervention will have less to do with the merits of your idea and mostly to do with the fears of loss your idea generates.

It falls to you, your allies, and others who lead in the organization to keep the work at the center. Begin by trying to understand the impact of new directions on the constituents behind the people in your working group, and how the pleasure or displeasure of those constituents is going to play out in the behavior of the person. Then think about how you can help that person with their problem, e.g., presenting the idea to their group or making sure the person receives credit for making the new idea happen.

A second strategy is to help the members of your team who are worried about their own people, interpret their group’s resistance in terms of threat and loss. Dealing with the fears of loss requires a strategy that takes these losses seriously and treats them with respect.

Finally, get allies. You need to share the burden of keeping the work at the center of people’s attention.

(Source: Chapter 9. Design Effective Interventions in *The Practice of Adaptive Leadership*)

Each of these seven steps can be understood as a skill set. Rate yourself on a scale from 1 to 10 for each of the seven steps. What are your strengths? Where do you need to build your skills?

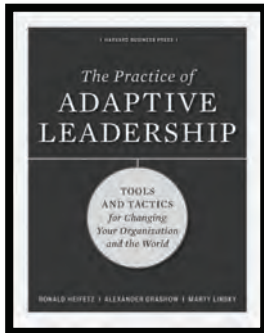
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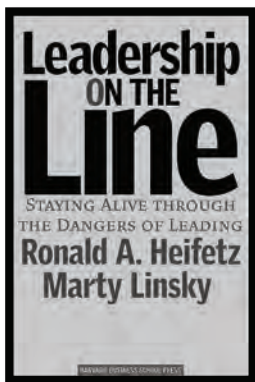
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The Practice of Adaptive Leadership

Ronald Heifetz, Martin Linsky, and Alexander Grashow (Cambridge: Harvard Business, 2009)

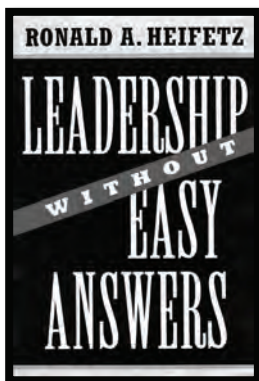
The Practice of Adaptive Leadership is a hands-on, practical guide containing stories, tools, diagrams, cases, and worksheets to help you develop your skills as an adaptive leader, able to take people outside their comfort zones and assess and address the toughest challenges. *The Practice of Adaptive Leadership* can be your handbook to meeting the demands of leadership in a complex world.



Leadership on the Line

Martin Linsky and Ronald A. Heifetz (Cambridge: Harvard Business, 2002)

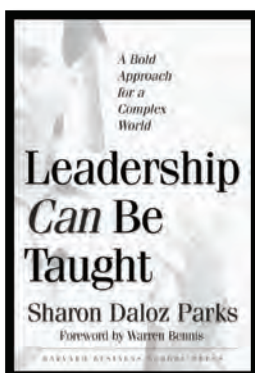
For all its passion and promise, for all its excitement and rewards, leading is risky, dangerous work. Why? Because real leadership—the kind that surfaces conflict, challenges long-held beliefs, and demands new ways of doing things, causes pain. And when people feel threatened, they take aim at the person pushing for change. In *Leadership on the Line* Heifetz and Linsky show that it is possible to put ourselves on the line, respond effectively to the risks, and live to celebrate our efforts. With compelling examples the authors illustrate proven strategies for surviving and thriving amidst the dangers of leading.



Leadership without Easy Answers

Ronald A. Heifetz (Cambridge: Harvard Business, 1998)

Ronald Heifetz offers a practical approach to leadership for those who lead as well as those who look to them for answers. Fitting the theory and practice of leadership to our extraordinary times, the book promotes a new social contract, a revitalization of our civic life just when we most need it. Drawing on a dozen years of research, Heifetz presents clear, concrete prescriptions for anyone who needs to take the lead in almost any situation, under almost any organizational conditions, no matter who is in charge. His strategy applies not only to people at the top but also to those who must lead without authority.



Leadership Can Be Taught

Sharon Daloz Parks (Cambridge: Harvard Business, 2005)

If leaders are made, not born, what is the best way to teach the skills they need to be effective? Sharon Daloz Parks invites readers to step into the classroom of Harvard leadership virtuoso Ronald Heifetz and his colleagues to understand a dynamic type of leadership and experience a mode of learning called “case in point.” Case-in-point uses individuals’ own experiences—and the classroom environment itself—as a “crucible” for learning. *Leadership Can Be Taught* reveals how we can learn, practice, and teach the art of leadership in more skilled, effective, and inspired forms.

A Guide for Adaptive Leadership

Problems that we can solve through the knowledge of experts are technical challenges. Problems that experts cannot solve are called adaptive challenges. Solutions to technical problems lie in the head and solving them requires intellect and logic. Solutions to adaptive problems lie in the stomach and the heart and rely on changing people's beliefs, habits, ways of working or ways of life. (Ronald Heifetz and Martin Linsky)

Adaptive challenges require experiments, discoveries and adjustments from many places in the organization or community. To make the adaptive leap to survive in the new environment requires people to learn new ways of behaving and adopt new values and attitudes. Sustaining change requires the people with the problem to internalize the change itself. (Ronald Heifetz and Martin Linsky)

1. Define the Challenges Confronting Leadership

Technical Problems	Adaptive Challenges
<ul style="list-style-type: none"> • Problem is well defined. • Answer is known. • Implementation is clear. 	<ul style="list-style-type: none"> • Challenge is complex. • Answers are not known. • Implementation requires innovation and learning.
Examples of Technical Problems	Adaptive Challenges in Your Church

2. Apply the Adaptive Leadership Process

Take a new adaptive challenge and plan your response using the adaptive leadership process:

Process	How Will You Do This?
1. Observing events and patterns around you <ul style="list-style-type: none"> • Stayed tuned to external clues from the environment and opportunities for innovation 	
2. Interpreting what you are observing (developing multiple hypotheses about what is really going on	
3. Designing interventions based on the observations and interpretations to address the adaptive challenge <ul style="list-style-type: none"> • Experiment and innovate with new practices, processes, programs, and/or activities • Evaluate the results of the intervention; learn; decide what needs to be improved • Modify the intervention using the evaluation results • Continue the cycle of innovating and learning 	

3. Facilitate the Process of Implementing an Intervention

Use the seven practices in the article to facilitate the process of making an intervention, and making your intervention more effective.



Becoming a Change Leader

From: *Switch: How to Change Things When Change is Hard*
Chip Heath and Dan Heath

*In their book *Switch: How to Change Things When Change Is Hard*, Chip and Dan Heath, authors and professors, ask the question why it's so hard to make lasting changes in our organizations, in our communities, and in our own lives. The primary obstacle, say the Heaths, is a conflict that's built into our brains. Psychologists have discovered that our minds are ruled by two different systems—the rational mind and the emotional mind—that compete for control. The rational mind wants a great beach body; the emotional mind wants that Oreo cookie. The rational mind wants to change something at work; the emotional mind loves the comfort of the existing routine. This tension can doom a change effort—but if it is overcome, change can come quickly. In this excerpt from Chapter One of their book, they describe the three elements of change that can be applied at every level of life—individual, organizational, and societal.*

Maybe you want to help your brother beat his gambling addiction. Maybe you need your team at work to act more frugally because of market conditions. Maybe you wish more of your neighbors would bike to work.

Usually these topics are treated separately—there is “change management” advice for executives and “self-help” advice for individuals and “change the world” advice for activists. That’s a shame, because all change efforts have something in common: For anything to change, someone has to start acting differently. Your brother has got to stay out of the casino; your employees have got to start booking coach fares. Ultimately, all change efforts boil down to the same mission: Can you get people to start behaving in a new way?

We know what you’re thinking—people resist change. But it’s not quite that easy. Babies are born every day to parents who, inexplicably, welcome the change. Think about the sheer magnitude of that change! Would anyone agree to work for a boss who’d wake you up twice a night, screaming, for trivial administrative

Chip Heath is professor at the Graduate School of Business at Stanford University. **Dan Heath** is a senior fellow at Duke University’s Center for the Advancement of Social Entrepreneurship (CASE). They are the authors of the bestselling books *Switch: How to Change Things When Change is Hard* (Broadway Books, 2010) and *Made to Stick: Why Some Ideas Survive and Others Die* (Random House, 2007).

This article is excerpted from Chapter One, Three Surprises of Change in *Switch: How to Change Things When Change is Hard* (New York: Broadway Books, 2010). Used by permission.

duties? (And what if, every time you wore a new piece of clothing, the boss spit up on it?) Yet people don't resist this massive change—they volunteer for it.

In our lives, we embrace lots of big changes—not only babies, but marriages and new homes and new technologies and new job duties. Meanwhile, other behaviors are maddeningly intractable. Smokers keep smoking and kids grow fatter and your husband can't ever seem to get his dirty shirts into a hamper.

So there are hard changes and easy changes. What distinguishes one from the other? We argue that successful changes share a common pattern. They require the leader of the change to do three things at once. We've already mentioned one of those three things: To change someone's behavior, you've got to change that person's situation.

The situation isn't the whole game, of course. You can send an alcoholic to rehab, where the new environment will help him go dry. But what happens when he leaves and loses that influence? You might see a boost in productivity from your sales reps when the sales manager shadows them, but what happens afterward when the situation returns to normal? For individuals' behavior to change, you've got to influence not only their environment but their hearts and minds.

The problem is this: Often the heart and mind disagree. Fervently.

Your Brain Isn't of One Mind

Our built-in schizophrenia is a deeply weird thing, but we don't think much about it because we're so used to it. When we kick off a new diet, we toss the Cheetos and Oreos out of the pantry, because our rational side knows that when our emotional side gets a craving, there's no hope of self-control. The only option is to remove the temptation altogether.

The unavoidable conclusion is this: **Your brain isn't of one mind.**

The conventional wisdom in psychology, in fact, is that the brain has two independent systems at work at all times. First, there's what we called the emotional side. It's the part of you that is instinctive, that feels pain and pleasure. Second, there's the rational side, also known as the reflective or

conscious system. It's the part of you that deliberates and analyzes and looks into the future.

In the past few decades, psychologists have learned a lot about these two systems, but of course mankind has always been aware of the tension. Plato said that in our heads we have a rational charioteer who has to rein in an unruly horse that "barely yields to horsewhip and goad combined." Freud wrote about the selfish id and the conscientious superego (and also about the ego, which mediates between them). More recently, behavioral economists dubbed the two systems the Planner and the Doer.

But, to us, the duo's tension is captured best by an analogy used by University of Virginia psychologist Jonathan Haidt in his wonderful book *The Happiness Hypothesis*. Haidt says that our emotional side is an Elephant and our rational side is its Rider. Perched atop the Elephant, the Rider holds the reins and seems to be the leader. But the Rider's control is precarious because the Rider is so small relative to the Elephant. Anytime the six-ton Elephant and the Rider disagree about which direction to go, the Rider is going to lose. He's completely overmatched.

Most of us are all too familiar with situations in which our Elephant overpowers our Rider. You've experienced this if you've ever slept in, overeaten, procrastinated, tried to quit smoking and failed, skipped the gym, gotten angry and said something you regretted, abandoned your Spanish or piano lessons, refused to speak up in a meeting because you were scared, and so on. Good thing no one is keeping score.

The weakness of the Elephant, our emotional and instinctive side, is clear: It's lazy and skittish, often looking for the quick payoff (ice cream cone) over the long-term payoff (being thin). When change efforts fail, it's usually the Elephant's fault, since the kinds of change we want typically involve short-term sacrifices for long-term payoffs. (We cut back on expenses today to yield a better balance sheet next year. We avoid ice cream today for a better body next year.) Changes often fail because the Rider simply can't keep the Elephant on the road long enough to reach the destination.

The Elephant's hunger for instant gratification is the opposite of the Rider's strength, which is the ability to think long-term, to plan, to think beyond the moment (all those things that your pet can't do).

But what may surprise you is that the Elephant also has enormous strengths and that the Rider has

crippling weaknesses. The Elephant isn't always the bad guy. Emotion is the Elephant's turf—love and compassion and sympathy and loyalty. That fierce instinct you have to protect your kids against harm—that's the Elephant. That spine-stiffening you feel when you need to stand up for yourself—that's the Elephant.

And even more important if you're contemplating a change, the Elephant is the one who gets things done. To make progress toward a goal, whether it's noble or crass, requires the energy and drive of the Elephant. And this strength is the mirror image of the Rider's great weakness: spinning his wheels. The Rider tends to overanalyze and overthink things. Chances are, you know people with Rider problems: your friend who can agonize for twenty minutes about what to eat for dinner; your colleague who can brainstorm about new ideas for hours but can't ever seem to make a decision.

If you want to change things, you've got to appeal to both. The Rider provides the planning and direction, and the Elephant provides the energy. So if you reach the Riders of your team but not the Elephants, team members will have understanding without motivation. If you reach their Elephants but not their Riders, they'll have passion without direction. In both cases, the flaws can be paralyzing. A reluctant Elephant and a wheel-spinning Rider can both ensure that nothing changes. But when Elephants and Riders move together, change can come easily.

Self-Control Is An Exhaustible Resource

When Rider and Elephant disagree about which way to move, you've got a problem. The Rider can get his way temporarily—he can tug on the reins hard enough to get the Elephant submit. (Anytime you use willpower you're doing exactly that.) But the Rider can't win a tug-of-war with a huge animal for long. He simply gets exhausted.

To see this point more clearly, consider the behavior of some college students who participated in a study about "food perception" (or so they were told). They reported to the lab a bit hungry; they'd been asked not to eat for at least three hours beforehand. They were led to a room that smelled amazing—the researchers had just baked chocolate-chip cookies. On a table in the center of the room

were two bowls. One held a sampling of chocolates, along with the warm, fresh-baked chocolate-chip cookies they'd smelled. The other bowl held a bunch of radishes.

The researchers had prepped a cover story: We've selected chocolates and radishes because they have highly distinctive tastes. Tomorrow, we'll contact you and ask about your memory of the taste sensations you experienced while eating them.

Half the participants were asked to eat two or three cookies and some chocolate candies, but no radishes. The other half were asked to eat at least two or three radishes, but no cookies. While they ate, the researchers left the room, intending, rather sadistically, to induce temptation: They wanted those poor radish-eaters to sit there, alone, nibbling on rabbit food, glancing enviously at the fresh-baked cookies. (It probably goes without saying that the cookie-eaters experienced no great struggle in resisting the radishes.) Despite the temptation, all participants ate what they were asked to eat, and none of the radish-eaters snuck a cookie. That's willpower at work.

At that point, the "taste study" was officially over, and another group of researchers entered with a second, supposedly unrelated study: We're trying to find who's better at solving problems, college students or high school students. This framing was intended to get the college students to puff out their chests and take the forthcoming task seriously.

The college students were presented with a series of puzzles that required them to trace a complicated geometric shape without retracing any lines and without lifting their pencils from the paper. They were given multiple sheets of paper so they could try over and over. In reality, the puzzles were designed to be unsolvable. The researchers wanted to see how long the college students would persist in a difficult, frustrating task before they finally gave up.

The "untempted" students, who had not had to resist eating the chocolate-chip cookies, spent 19 minutes on the task, making 34 well-intentioned attempts to solve the problem.

The radish-eaters were less persistent. They gave up after only 8 minutes—less than half the time spent by the cookie-eaters—and they managed only 19 solution attempts. Why did they quit so easily?

The answer may surprise you: They ran out of self-control. In studies like this one, psychologists have discovered that self-control is an exhaustible resource. It's like doing bench presses at the gym.

The first one is easy, when your muscles are fresh. But with each additional repetition, your muscles get more exhausted, until you can't lift the bar again. The radish-eaters had drained their self-control by resisting the cookies. So when their Elephants, inevitably, started complaining about the puzzle task—*it's too hard, it's no fun, we're no good at this*—their Riders didn't have enough strength to yank on the reins for more than 8 minutes. Meanwhile, the cookie-eaters had a fresh, untaxed Rider, who fought off the Elephant for 19 minutes.

Self-control is an exhaustible resource. This is a crucial realization, because when we talk about "self-control," we don't mean the narrow sense of the word, as in the willpower needed to fight vice (smokes, cookies, alcohol). We're talking about a broader kind of self-supervision. Think of the way your mind works when you're giving negative feedback to an employee, or assembling a new bookshelf, or learning a new dance. You are careful and deliberate with your words or movements. It feels like there's a supervisor on duty. That's self-control, too.

Contrast that with all the situations in which your behavior doesn't feel "supervised"—for instance, the sensation while you're driving that you can't remember the last few miles of road, or the easy, unthinking way you take a shower or make your morning coffee. Much of our daily behavior, in fact, is more automatic than supervised, and that's a good thing because the supervised behavior is the hard stuff. It's draining.

Dozens of studies have demonstrated the exhausting nature of self-supervision. For instance, people who were asked to make tricky choices and trade-offs—such as setting up a wedding registry or ordering a new computer—were worse at focusing and solving problems than others who hadn't made the tough choices. In one study, some people were asked to restrain their emotions while watching a sad movie about sick animals. Afterward, they exhibited less physical endurance than others who'd let the tears flow freely. The research shows that we burn up self-control in a wide variety of situations: managing the impression we're making on others; coping with fears; controlling our spending; trying to focus on simple instructions such as "Don't think of a white bear"; and many, many others.

Here's why this matters for change: When people try to change things, they're usually tinkering with behaviors that have become automatic, and changing those behaviors requires careful

supervision by the Rider. The bigger the change you're suggesting, the more it will sap people's self-control.

And when people exhaust their self-control, what they're exhausting are the mental muscles needed to think creatively, to focus, to inhibit their impulses, and to persist in the face of frustration or failure. In other words, they're exhausting precisely the mental muscles needed to make a big change.

So when you hear people say that change is hard because people are lazy or resistant, that's just flat wrong. In fact, the opposite is true: Change is hard because people wear themselves out. And that's the second surprise about change: ***What looks like laziness is often exhaustion.***

When You Break Through to Feeling Things Change

Jon Stegner believed the company he worked for, a large manufacturer, was wasting vast sums of money. "I thought we had an opportunity to drive down purchasing costs not by 2 percent but by something on the order of \$1 billion over the next five years," said Stegner, who is quoted in John Kotter and Dan Cohen's essential book *The Heart of Change*.

To reap these savings, a big process shift would be required, and for that shift to occur, Stegner knew that he'd have to convince his bosses. He also knew that they'd never embrace such a big shift unless they believed in the opportunity, and for the most part, they didn't.

Seeking a compelling example of the company's poor purchasing habits, Stegner assigned a summer student intern to investigate a single item—work gloves, which workers in most of the company's factories wore. The student embarked on a mission to identify all the types of gloves used in all the company's factories and then trace back what the company was paying for them.

The intrepid intern soon reported that the factories were purchasing 424 different kinds of gloves! Furthermore, they were using different glove suppliers, and they were all negotiating their own prices. The same pair of gloves that cost \$5 at one factory might cost \$17 at another.

At Stegner's request, the student collected a specimen of every one of the 424 different types of gloves and tagged each with the price paid. Then all

the gloves were gathered up, brought to the boardroom, and piled up on the conference table. Stegner invited all the division presidents to come visit the Glove Shrine. He recalled the scene: What they saw was a large expensive table, normally clean or with a few papers, now stacked high with gloves. Each of our executives stared at this display for a minute. Then each said something like, “We really buy all these different kinds of gloves?” Well, as a matter of fact, yes we do. “Really?” Yes, really. Then they walked around the table. . . They could see the prices. They looked at two gloves that seemed exactly alike, yet one was marked \$3.22 and the other \$10.55. It’s a rare event when these people don’t have anything to say. But that day, they just stood with their mouths gaping.

The gloves exhibit soon became a traveling road show, visiting dozens of plants. The reaction was visceral: *This is crazy. We’re crazy. And we’ve got to make sure this stops happening.* Soon Stegner had exactly the mandate for change that he’d sought. The company changed its purchasing process and saved a great deal of money. This was exactly the happy ending everyone wanted (except, of course, for the glove salesmen who’d managed to sell the \$5 gloves for \$17).

Let’s be honest: Most of us would not have tried what Stegner did. It would have been so easy, so natural, to make a presentation that spoke only to the Rider. Think of the possibilities: the spreadsheets, the savings data, the cost-cutting protocols, the recommendations for supplier consolidation, the exquisite logic for central purchasing. You could have created a 12-tabbed Microsoft Excel spreadsheet that would have made a tax accountant weep with joy. But instead of doing any of that, Stegner dumped a bunch of gloves on a table and invited his bosses to see them.

If there is such a thing as white-collar courage, surely this was an instance.

Stegner knew that if things were going to change, he had to get his colleagues’ Elephants on his side. If he had made an analytical appeal, he probably would have gotten some supportive nods, and the execs might have requested a follow-up meeting six weeks later (and then rescheduled it). The analytical case was compelling—by itself, it might have convinced Stegner’s colleagues that overhauling the purchasing system would be an important thing to do . . . next year.

Remember that if you reach your colleagues’ Riders but not their Elephants, they will have

direction without motivation. Maybe their Riders will drag the Elephant down the road for a while, but as we’ve seen, that effort can’t last long.

Once you break through to *feeling*, though, things change. Stegner delivered a jolt to his colleagues. First, they thought to themselves, *We’re crazy!* Then they thought, *We can fix this.* Everyone could think of a few things to try to fix the glove problem—and by extension the ordering process as a whole. That got their Elephants fired up to move.

We don’t expect potential billion-dollar change stories to come dressed up like this. The change effort was led by a single employee, with the able help of a summer intern. It focused on a single product. The scope of the presentation didn’t correspond in any way to the scope of the proposal. Yet Stegner’s strategy worked.

That’s the power of speaking to both the Rider and the Elephant.

What Looks Like Resistance Is Often a Lack of Clarity

It’s true that an unmotivated Elephant can doom a change effort, but let’s not forget that the Rider has his own issues. He’s a navel-gazer, an analyzer, a wheel-spinner. If the Rider isn’t sure exactly what direction to go, he tends to lead the Elephant in circles. And as we’ll see, that tendency explains the third and final surprise about change: ***What looks like resistance is often a lack of clarity.***

Two health researchers, Steve Booth-Butterfield and Bill Reger, professors at West Virginia University, were contemplating ways to persuade people to eat a healthier diet. From past research, they knew that people were more likely to change when the new behavior expected of them was crystal clear, but unfortunately, “eating a healthier diet” was anything but.

Where to begin? Which foods should people stop (or start) eating? Should they change their eating behavior at breakfast, lunch, or dinner? At home or in restaurants? The number of ways to “eat healthier” is limitless, especially given the starting place of the average American diet. This is exactly the kind of situation in which the Rider will spin his wheels, analyzing and agonizing and never moving forward.

As the two researchers brainstormed, their thoughts kept coming back to milk. Most Americans

drink milk, and we all know that milk is a great source of calcium. But milk is also the single largest source of saturated fat in the typical American's diet. In fact, calculations showed something remarkable: If Americans switched from whole milk to skim or 1% milk, the average diet would immediately attain the USDA recommended levels of saturated fat.

How do you get Americans to start drinking low-fat milk? You make sure it shows up in their refrigerators. And that isn't an entirely facetious answer. People will drink whatever is around the house—a family will plow through low-fat milk as fast as whole milk. So, in essence, the problem was even easier than anticipated: You don't need to change *drinking* behavior. You need to change *purchasing* behavior.

Suddenly the intervention became razor-sharp. What behavior do we want to change? We want consumers to buy skim or 1% milk. When? When they're shopping for groceries. Where? Duh. What else needs to change? Nothing (for now).

Reger and Booth-Butterfield launched a campaign in two communities in West Virginia, running spots on the local media outlets (TV, newspaper, radio) for two weeks. In contrast to the bland messages of most public-health campaigns, the 1% milk campaign was punchy and specific. One ad trumpeted the fact that one glass of whole milk has the same amount of saturated fat as five strips of bacon! At a press conference, the researchers showed local reporters a tube full of fat—the equivalent of the amount found in a half-gallon of whole milk. (Notice the Elephant appeals: They're going for an "Oh, gross!" reaction.)

Reger and Booth-Butterfield monitored milk sales data at all eight stores in the intervention area. Before the campaign, the market share of low-fat milk was 18 percent. After the campaign, it was 41 percent. Six months later, it held at 35 percent.

This brings us to the final part of the pattern that characterizes successful changes: If you want people to change, you must provide crystal-clear direction.

By now, you can understand the reason this is so important: It's so the Rider doesn't spin his wheels. If you tell people to "act healthier," think of how many ways they can interpret that— imagine their Riders contemplating the options endlessly. (Do I eat more grains and less meat? Or vice versa? Do I start taking vitamins? Would it be a good trade-off if I exercise more and bribe myself with ice cream?

Should I switch to Diet Coke, or is the artificial sweetener worse than the calories?)

What looks like resistance is often a lack of clarity. Before this study, we might have looked at these West Virginians and concluded they were the kind of people who don't care about their health. But if they were indeed "that kind" of people, why was it so easy to shift their behavior?

If you want people to change, you don't ask them to "act healthier." You say, "Next time you're in the dairy aisle of the grocery store, reach for a jug of 1% milk instead of whole milk."

Three-Part Framework for Change

Now you've had a glimpse of the basic three-part framework, one that can guide you in any situation where you need to change behavior:

- **Direct the Rider.** What looks like resistance is often a lack of clarity. So provide crystal-clear direction. (Think 1% milk.)
- **Motivate the Elephant.** What looks like laziness is often exhaustion. The Rider can't get his way by force for very long. So it's critical that you engage people's emotional side—get their Elephants on the path and cooperative. (Think of the cookies and radishes study and the boardroom conference table full of gloves.)
- **Shape the Path.** What looks like a people problem is often a situation problem. We call the situation (including the surrounding environment) the "Path." When you shape the Path, you make change more likely, no matter what's happening with the Rider and Elephant.

We created this framework to be useful for people who don't have scads of authority or resources. Some people can get their way by fiat. CEOs, for instance, can sell off divisions, hire people, fire people, change incentive systems, merge teams, and so on. Politicians can pass laws or impose punishments to change behavior. The rest of us don't have these tools (though, admittedly, they

would make life easier: “Son, if you don’t take out the trash tonight, you’re fired”).

As helpful as we hope this framework will be to you, we’re well aware, and you should be, too, that this framework is no panacea. For one thing, it’s incomplete. We’ve deliberately left out lots of great thinking on change in the interests of creating a framework that’s simple enough to be practical. For another, there’s a good reason why change can be difficult: The world doesn’t always want what you want. You want to change how others are acting, but they get a vote. You can cajole, influence, inspire, and motivate— but sometimes an employee would rather lose his job than move out of his comfortable routines. Sometimes the alcoholic will want another drink no matter what the consequences.

So we don’t promise that we’re going to make change easy, but at least we can make it *easier*. Our goal is to teach you a framework, based on decades of scientific research, that is simple enough to remember and flexible enough to use in many different situations—family, work, community, and otherwise.

To change behavior, you’ve got to direct the Rider, motivate the Elephant, and shape the Path. If you can do all three at once, dramatic change can happen even if you don’t have lots of power or resources behind you. For proof of that, we don’t need to look beyond Donald Berwick, a man who changed the face of health care.

Saving Lives: A Story of Change

In 2004, Donald Berwick, a doctor and the CEO of the Institute for Healthcare Improvement (IHI), had some ideas about how to save lives—massive numbers of lives. Researchers at the IHI had analyzed patient care with the kinds of analytical tools used to assess the quality of cars coming off a production line. They discovered that the “defect” rate in health care was as high as 1 in 10—meaning, for example, that 10 percent of patients did not receive their antibiotics in the specified time. This was a shockingly high defect rate—many other industries had managed to achieve performance at levels of 1 error in 1,000 cases (and often far better). Berwick knew that the high medical defect rate meant that tens of thousands of patients were dying every year, unnecessarily.

Berwick’s insight was that hospitals could benefit from the same kinds of rigorous process improvements that had worked in other industries. Couldn’t a transplant operation be “produced” as consistently and flawlessly as a Toyota Camry?

Berwick’s ideas were so well supported by research that they were essentially indisputable, yet little was happening. He certainly had no ability to force any changes on the industry. IHI had only seventy-five employees. But Berwick wasn’t deterred.

On December 14, 2004, he gave a speech to a room full of hospital administrators at a large industry convention. He said, “Here is what I think we should do. I think we should save 100,000 lives. And I think we should do that by June 14, 2006—18 months from today. Some is not a number; soon is not a time. Here’s the number: 100,000. Here’s the time: June 14, 2006—9 a.m.”

The crowd was astonished. The goal was daunting. But Berwick was quite serious about his intentions. He and his tiny team set out to do the impossible.

IHI proposed six very specific interventions to save lives. For instance, one asked hospitals to adopt a set of proven procedures for managing patients on ventilators, to prevent them from getting pneumonia, a common cause of unnecessary death. (One of the procedures called for a patient’s head to be elevated between 30 and 45 degrees, so that oral secretions couldn’t get into the windpipe.)

Of course, all hospital administrators agreed with the goal to save lives, but the road to that goal was filled with obstacles. For one thing, for a hospital to reduce its “defect rate,” it had to acknowledge having a defect rate. In other words, it had to admit that some patients were dying needless deaths. Hospital lawyers were not keen to put this admission on record.

Berwick knew he had to address the hospitals’ squeamishness about admitting error. At his December 14 speech, he was joined by the mother of a girl who’d been killed by a medical error. She said, “I’m a little speechless, and I’m a little sad, because I know that if this campaign had been in place four or five years ago, that Josie would be fine.... But, I’m happy, I’m thrilled to be part of this, because I know you can do it, because you have to do it.”

Another guest on stage, the chair of the North Carolina State Hospital Association, said: “An awful lot of people for a long time have had their heads in

the sand on this issue, and it's time to do the right thing. It's as simple as that."

IHI made joining the campaign easy: It required only a one-page form signed by a hospital CEO. By two months after Berwick's speech, over a thousand hospitals had enrolled. Once a hospital enrolled, the IHI team helped the hospital embrace the new interventions. Team members provided research, step-by-step instruction guides, and training. They arranged conference calls for hospital leaders to share their victories and struggles with one another. They encouraged hospitals with early successes to become "mentors" to hospitals just joining the campaign.

The friction in the system was substantial. Adopting the IHI interventions required hospitals to overcome decades' worth of habits and routines. Many doctors were irritated by the new procedures, which they perceived as constricting. But the adopting hospitals were seeing dramatic results, and their visible successes attracted more hospitals to join the campaign.

Eighteen months later, at the exact moment he'd promised to return—June 14, 2006, at 9 a.m.—Berwick took the stage again to announce the results: "Hospitals enrolled in the 100,000 Lives Campaign have collectively prevented an estimated 122,300 avoidable deaths and, as importantly, have begun to institutionalize new standards of care that will continue to save lives and improve health outcomes into the future."

The crowd was euphoric. Don Berwick, with his 75-person team at IHI, had convinced thousands of hospitals to change their behavior, and collectively, they'd saved 122,300 lives—the equivalent of throwing a life preserver to every man, woman, and child in Ann Arbor, Michigan.

This outcome was the fulfillment of the vision Berwick had articulated as he closed his speech eighteen months earlier, about how the world would look when hospitals achieved the 100,000 lives goal:

"And, we will celebrate. Starting with pizza, and ending with champagne. We will celebrate the importance of what we have undertaken to do, the courage of honesty, the joy of companionship, the cleverness of a field operation, and the results we will achieve. We will celebrate ourselves, because the patients whose lives we save cannot join us, because their names can never be known. Our contribution

will be what did not happen to them. And, though they are unknown, we will know that mothers and fathers are at graduations and weddings they would have missed, and that grandchildren will know grandparents they might never have known, and holidays will be taken, and work completed, and books read, and symphonies heard, and gardens tended that, without our work, would have been only beds of weeds."

The Framework Applied

Big changes can happen.

Don Berwick and his team catalyzed a change that saved 100,000 lives, yet Berwick himself wielded no power. He couldn't change the law. He couldn't fire hospital leaders who didn't agree with him. He couldn't pay bonuses to hospitals that accepted his proposals.

Berwick had the same tools the rest of us have. **First, he directed his audience's Riders.** The destination was crystal clear: *Some is not a number; soon is not a time. Here's the number: 100,000. Here's the time: June 14, 2006—9 a.m.* But that wasn't enough. He had to help hospitals figure out how to get there, and he couldn't simply say, "Try harder." (Remember "act healthier" versus "buy 1% milk.") So he proposed six specific interventions, such as elevating the heads of patients on ventilators, that were known to save lives. By staying laser-focused on these six interventions, Berwick made sure not to exhaust the Riders of his audience with endless behavioral changes.

Second, he motivated his audience's Elephants. He made them feel the need for change. Many of the people in the audience already knew the facts, but knowing was not enough. (Remember, knowing wasn't enough for executives at Jon Stegner's company. It took a stack of gloves to get their Elephants engaged.) Berwick had to get beyond knowing, so he brought his audience face-to-face with the mother of the girl who'd been killed by a medical error: "I know that if this campaign had been in place four or five years ago, that Josie would be fine." Berwick was also careful to motivate the people who hadn't been in the room for his presentation. He didn't challenge people to "overhaul medicine" or "bring TQM to health care." He challenged them to save 100,000 lives. That speaks to anyone's Elephant.

Third, he shaped the Path. He made it easier for the hospitals to embrace the change. Think of the one-page enrollment form, the step-by-step instructions, the training, the support groups, the mentors. He was designing an environment that made it more likely for hospital administrators to reform. Berwick also knew that behavior was contagious. He used peer pressure to persuade hospitals to join the campaign. (*Your rival hospital across town just signed on to help save 100,000 lives. Do you really want them to have the moral high ground?*) He also connected people—he matched up people who were struggling to implement the changes with people who had mastered them, almost like the “mentors” found in Alcoholics Anonymous. Berwick was creating a support group for health care reform.

Whether the switch you seek is in your family, in your charity, in your organization, or in society at

large, you’ll get there by making three things happen. You’ll direct the Rider, motivate the Elephant, and shape the Path.

Resources

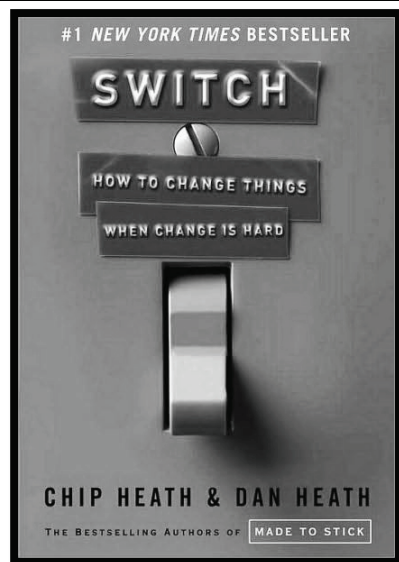
Heath, Chip and Dan Heath. *Switch: How to Change Things When Change Is Hard*. New York: Broadway, 2010.

Heath, Chip and Dan Heath. *Switch Your Organization: A Workbook*. Download from <http://heathbrothers.com/resources>

Switch Podcasts: 1) Managers, 2) Marketers, 3) Social Sector, 4) Personal Change

(<http://heathbrothers.com/resources>)

Switch Website: <http://heathbrothers.com>



Switch: How to Change Things When Change is Hard Chip Heath and Dan Heath (New York: Broadway Books, 2010)

Switch asks the following question: Why is it so hard to make lasting changes in our companies, in our communities, and in our own lives? The primary obstacle, say the Heaths, is a conflict that’s built into our brains. Psychologists have discovered that our minds are ruled by two different systems—the rational mind and the emotional mind—that compete for control. The rational mind wants a great beach body; the emotional mind wants that Oreo cookie. The rational mind wants to change something at work; the emotional mind loves the comfort of the existing routine. This tension can doom a change effort—but if it is overcome, change can come quickly. In *Switch*, the Heaths show how everyday people—employees and managers, parents and nurses—have united both minds and, as a result, achieved dramatic results:

- The lowly medical interns who managed to defeat an entrenched, decades-old medical practice that was endangering patients.
- The home-organizing guru who developed a simple technique for overcoming the dread of housekeeping.
- The manager who transformed a lackadaisical customer-support team into service zealots by removing a standard tool of customer service

In a compelling, story-driven narrative, the Heaths bring together decades of counterintuitive research in psychology, sociology, and other fields to shed new light on how we can effect transformative change. *Switch* shows that successful changes follow a pattern, a pattern you can use to make the changes that matter to you, whether your interest is in changing the world or changing your waistline.

A Guide to Facilitating Change

Use the process developed by Chip and Dan Heath in *Switch* to develop a plan for preparing to implement a new project (how you would use each step) or to conduct an evaluation of a new project that you have already implemented (how you did or did not use each step). For practical checklists for each step of the process download *Switch Your Organization: A Workbook* at <http://heathbrothers.com/resources>.

The Switch Framework

1. <i>Direct the Rider</i> (the conscious mind), eliminating what looks like resistance but is more often a lack of clarity by providing crystal-clear direction	
	Ways to use this in your project
Following the bright spots: investigate what's working and clone it.	
Script the critical moves: don't think big picture, think in terms of specific behaviors.	
Point to the destination: change is easier when you know where you're going and why it's worth it.	
2. <i>Motivate the Elephant</i> (the subconscious), eliminating what looks like laziness but is more often exhaustion by engaging emotions to get people on the same path as you	
	Ways to use this in your project
Find the feeling: knowing something isn't enough to cause change. Make people feel something.	
Shrink the change: break down the change until it no longer spooks the Elephant.	
Grow your people: cultivate a sense of identity and instill the growth mindset.	
3. <i>Shape the Path</i> (the situation), eliminating what looks like a people problem but is more often a situation problem, by making the environment more conducive to the change you seek	
	Ways to use this in your project
Tweak the environment: when the situation changes, the behavior changes. So change the situation.	
Build habits: when behavior is habitual, it's "free"—it doesn't tax the Rider. Look for ways to encourage habits.	
Rally the herd: behavior is contagious. Help it spread.	



Becoming a Culturally Intelligent Leader

Linn Van Dyne, Soon Ang, and David Livermore

Cultural intelligence refers to *an individual's capability to function effectively across cultures*—this can include national, ethnic, and organizational as well as other types of culture. Rather than expecting individuals to master all the norms, values, and practices of the various cultures encountered, cultural intelligence helps leaders develop an overall perspective and repertoire that results in more effective leadership. The driving question behind the idea of cultural intelligence (or CQ) is this: *Why do some leaders easily and effectively adapt their views and behaviors cross-culturally and others don't?* Your honest engagement with that question can determine whether or not you lead successfully in our rapidly globalizing world. In this article, we provide an overview of cultural intelligence and describe the Four-Factor Model of Cultural Intelligence (motivational CQ, cognitive CQ, metacognitive CQ, and behavioral CQ) with the aim of helping you to think more deeply about your own cultural intelligence capabilities as well as helping you to apply these ideas and the CQ framework.

What is Cultural Intelligence (CQ)?

Most of us know that IQ or intelligence quotient is a measurement of one's intellectual capabilities. In recent years, we've also seen the significance of EQ or emotional intelligence—one's ability to lead and interact with effective emotional sensibilities. Cultural intelligence builds upon some of these same ideas, but instead focuses specifically on one's capability to effectively understand and adapt to a myriad of cultural contexts as an additional and essential skill set needed by contemporary leaders.

Theories and books about cross-cultural interaction abound. A great deal of that material focuses on cultural knowledge—knowing how cultures differ in work norms, habits, and behaviors. The cultural intelligence approach goes beyond this emphasis on knowledge because it also emphasizes the importance of

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developing an overall repertoire of understanding, motivation, and skills that enables one to move in and out of lots of different cultural contexts. Cultural intelligence considers cultural, sociological, and individual dynamics that occur for each of us in cross-cultural settings.

Research demonstrates that effective cross-cultural leadership isn't just a matter of emotional intelligence and common sense. Just as emotional intelligence focuses on a leader's ability to work effectively with people by paying attention to the emotions of self and others, cultural intelligence focuses on a leader's ability to function effectively with people and in situations involving different cultural backgrounds. When we interact with people from our own culture, we intuitively use a set of social cues to engage effectively. We have a wealth of information, most of which is subconscious, that helps us know how to relate and lead.

In contrast, when we experience a new culture, cues and information that have worked in the past are largely absent or misleading. For example, in culturally unfamiliar situations, it sometimes seems that other people's behavior and perspectives are somewhat bizarre and random. Those with high CQ have the ability to encounter these types of confusing situations, think deeply about what is happening (or not happening), and make appropriate adjustments to how they understand, relate, and lead in the context of this different culture.

Making these kinds of adjustments involves a complex set of capabilities and processes that comes from intentional effort on the part of the leader, all of which contribute to the leader's CQ. Cultural intelligence is a set of capabilities and skills that enables leaders from outside a culture to interpret unfamiliar behaviors and situations as though they were insiders to that culture. One of the most important things to assess when looking for culturally intelligent leaders is to see whether the person can identify behaviors that are universal to all humanity, behaviors that are cultural, and behaviors that are idiosyncratically personal to a particular individual in a specific situation.

The Four-Factor Model of Cultural Intelligence

The cultural intelligence model is rooted in a four-factor framework that synthesizes the volumes of material and perspectives on intelligence and cross-cultural leadership. CQ is composed of four qualitatively different capabilities, and yet, each of the four factors is interrelated. For real effectiveness, leaders need all four CQ capabilities, because focusing only on one factor of CQ may actually result in increased cultural ignorance rather than enhanced cultural intelligence. This is because CQ requires an overall repertoire of adaptive capabilities. The four factors of CQ are motivational CQ, cognitive CQ, metacognitive CQ, and behavioral CQ. Each is described below.

The Four-Factor Model of Cultural Intelligence

<p>Motivational CQ Intrinsic Extrinsic Self-Efficacy</p>
<p>Cognitive CQ Cultural Systems Cultural Norms and Values</p>
<p>Metacognitive CQ Awareness Planning Checking</p>
<p>Behavioral CQ Verbal Nonverbal Speech Acts</p>

Motivational CQ: Showing Interest, Confidence, and Drive to Adapt Cross-Culturally

The motivational factor of CQ refers to the leader's level of interest, drive, and energy to adapt cross-culturally. This refers to whether or not you have the confidence and *drive* to work through the challenges and conflict that often accompany cross-cultural work. The ability to be personally engaged and to

persevere through cross-cultural challenges is one of the novel and most important aspects of the cultural intelligence framework. Many of the other approaches to thinking about cross-cultural competencies simply assume that people are motivated to gain cross-cultural capabilities. Yet employees often approach diversity training apathetically, and employees headed out on international assignments are often more concerned about moving their families overseas and getting settled than they are about developing cultural understanding. Without ample motivation, there's little point in spending time and money on training.

Motivational cultural intelligence includes intrinsic motivation—the degree to which you derive enjoyment from culturally diverse situations; extrinsic motivation—the more tangible benefits you gain from culturally diverse experiences; and self-efficacy—your confidence that you will be effective in a cross-cultural encounter. All three of these motivational dynamics play a role in how leaders approach cross-cultural situations. Stop and examine your level of drive for doing cross-cultural work. Your motivational CQ is strongly related to your level of effectiveness in new cultural contexts.

Cognitive CQ: Understanding Cross-Cultural Issues and Differences

Cognitive CQ is the *knowledge* dimension of cultural intelligence. It refers to the leader's level of understanding about culture and culture's role in shaping the way to do business and interact with others across cultural contexts. Your cognitive CQ or knowledge is based on the degree to which you understand the idea of culture and how it shapes the way you think and behave. It also includes your overall understanding of the ways that cultures vary from one context to the next.

One of the most important parts of cognitive CQ is an understanding of cultural systems and the set of cultural norms and values associated with different societies. Cultural systems are the ways societies organize themselves to meet the basic needs of humanity. For example, every nation has cultural systems for (1) economic approaches for producing vital commodities and distributing products and services; (2) ways of codifying mating and child-rearing practices that create marriage, family, and other social structures; (3) educational

practices that enable learning and cultural transmission; (4) political, legal, and social controls that reduce anarchy and destruction (obedience to social norms); (5) language conventions that facilitate interaction; and (6) religious beliefs that explain inexplicable phenomena.

Cultural norms and values are the varying ways cultures approach things like time, authority, and relationships. Although an understanding of how a family system works might seem somewhat theoretical, it becomes critically relevant when you're trying to develop human resource policies for employees coming from a place where the cultural norms dictate that employees will care for senior members of their extended families. Likewise, the value a culture places on time and relationships becomes highly germane when an American is trying to get a signed contract from a potential affiliate in China or Brazil or Saudi Arabia or Spain, where cultural values provide different norms for what is considered appropriate in this type of situation.

Metacognitive CQ: Strategizing and Making Sense of Culturally Diverse Experiences

The metacognitive factor of CQ refers to the leader's ability to strategize when crossing cultures. Metacognitive CQ, or *strategy*, involves slowing down long enough to carefully observe what's going on inside our own and other people's heads. It's the ability to think about our own thought processes and draw on our cultural knowledge to understand a different cultural context and solve problems in that situation. It includes whether we can use our cultural knowledge to plan an appropriate strategy, accurately interpret what's going on in a cross-cultural situation, and check to see whether our expectations are accurate or whether our mental model of that particular person and/or culture should be revised.

Seasoned leaders often jump into meetings with little planning. This can work well in one's home culture. By drawing on emotional intelligence and leadership experience, we can often get away with "winging it" because we know how to respond to cues and how to talk about our work. When meetings involve individuals from different cultural contexts, however, all the rules change. Relying on our ability to intuitively respond to cues in these

more novel situations is dangerous. That's where this third factor of cultural intelligence, metacognitive CQ, comes in.

Metacognitive CQ includes awareness, planning, and checking. Awareness means being in tune with what's going on in one's self and others. Planning is taking the time to prepare for a cross-cultural encounter—anticipating how to approach the people, topic, and situation. Checking is the monitoring we do as we engage in interactions to see whether the plans and expectations we had were appropriate. It's comparing what we expected with our actual experience—with what happened. This factor of CQ reflects whether or not we can engage in awareness, planning, and checking in ways that result in better contemporary leadership practices. Metacognitive CQ emphasizes strategy and is the lynchpin between understanding cultural issues and actually being able to use that understanding to be more effective.

Behavioral CQ: Changing Verbal and Nonverbal Actions Appropriately When Interacting Cross-Culturally

Behavioral CQ, the *action* dimension of CQ, refers to the leader's ability to act appropriately in a range of cross-cultural situations. It influences whether we can actually accomplish our performance goals effectively in light of different norms across cross-cultural situations. One of the most important aspects of behavioral CQ is knowing when to adapt to another culture and when not to do so. A person with high CQ learns which actions will and will not enhance effectiveness and acts on that understanding. Thus, behavioral CQ involves flexible actions tailored to the specific cultural context.

The behavioral factor of CQ includes the capability to be flexible in verbal and nonverbal actions. It also includes appropriate flexibility in speech acts—the exact words and phrases we use when we communicate specific types of messages. While the demands of today's intercultural settings make it impossible to master all the do's and don'ts of various cultures, there are certain behaviors that should be modified when we interact with different cultures. For example, Westerners need to learn the importance of carefully studying business cards

presented by those from most Asian contexts. Also, some basic verbal and nonverbal behaviors enhance the extent to which we are seen as effective by others. As an example, the verbal tone (loud versus soft) in which words are spoken can convey different meanings across cultures. Although it is not necessary for an outsider to master the intricacies of bowing in Japan, appropriate use of touch is something to bear in mind. In sum, almost every approach to cross-cultural work has insisted on the importance of flexibility. With behavioral CQ, we now have a way of exploring how to enhance our flexibility.

Four Steps Toward Enhancing Overall CQ

Although the four factors of cultural intelligence don't always develop in one particular order, it can be helpful to think about the four factors as four steps toward enhanced overall cultural intelligence.

1. Step 1: Motivational CQ (Drive) gives us the energy and self-confidence to pursue the needed cultural understanding and planning.
2. Step 2: Cognitive CQ (Knowledge) provides us with an understanding of basic cultural cues.
3. Step 3: Metacognitive CQ (Strategy) allows us to draw upon our cultural understanding so we can plan and interpret what's going on in diverse contexts.
4. Step 4: Behavioral CQ (Action) provides us with the ability to engage in effective flexible leadership across cultures.
5. Feedback Loop: Others respond to our behavior; this influences our motivational CQ; and the cycle starts over—leading to further enhancement of overall cultural intelligence.

It is an exciting time to be involved in cross-cultural leadership! Almost every day each of us has the opportunity to learn from people who are different from us—people in various walks of life who are from different cultural backgrounds. Cultural intelligence offers us a pathway—a set of steps and capabilities for this journey—that should allow us to show respect and dignity for others while enhancing our own effectiveness in multicultural contexts.

A Guide to Leading with Cultural Intelligence

We move in and out of socioethnic cultures, generational cultures, and organizational cultures in our daily lives. Numerous other cultural contexts exist in our lives as well, including cultures organized by professional careers, gender-oriented cultures, and cultures characterized by sexual preference and socioeconomic difference. One of the essentials for leadership in the twenty-first century is the ability to develop cultural intelligence, that is a person's capability to function effectively in situations characterized by cultural diversity—ethnic, religious, generational, and organizational to name only four.

As the world becomes more connected than ever, cross-cultural interactions are becoming the critical issue of our day. Cultural intelligence is needed by ministry leaders all across the United States. The flattened world is bringing us more and more encounters with people who aren't like us. We cannot hope to become experts on every cultural context in which we find ourselves. But through cultural intelligence, we can enhance our ability to interact with one another in ways that are respectful, loving, and dignifying.

In his book *Cultural Intelligence: Improving Your CQ to Engage Our Multicultural World* David Livermore illustrates the challenge of living in a culturally diverse world with this example of a youth leader in a congregation:

Let's use a youth leader to think about the reasons a twenty-first century ministry leader needs cultural intelligence. In addition to serving youth from various ethnic backgrounds, a youth worker also deals with the generational divides between the youth, their parents, and the seniors in the church. On top of that, the youth pastor must learn the culture of the particular church and possibly the denomination of which it is a part. Who holds the power, how is conflict handled, and what are the sacred rituals? But then add to these differences the subcultures among the youth themselves, whether they be jocks, goths, rave enthusiasts, techies, or preppies. Increasingly youth base their cultural identity on issues such as sexual preference, social class, and musical genre. And then the youth leader must deal with the

upcoming missions trip to Mexico. And the invitation to partner with an urban youth ministry nearby. And the overriding tension felt by youth pastors to engage students with the gospel while struggling to relate the church culture from which they operate to the all-pervasive popular culture and Internet-linked world in which students feel most at home. Get the picture? Cultural intelligence relates to the everyday realities of life in the twenty-first century. (Livermore, 30)

Think about the five to ten different cultural contexts you most regularly encounter. What ethnic cultures are represented in your church, community and work life? Where do you travel and who do you encounter? What organizational cultures do you engage week by week? What generational dynamics do you face among your family and friends, and in your church community?

David Livermore, in his books *Cultural Intelligence: Improving Your CQ to Engage Our Multicultural World* and *Leading with Cultural Intelligence*, describes four dimensions of cultural intelligence (CQ).



■ **Step 1. Drive (Motivational CQ)** is the person's level of interest, drive, and motivation to adapt cross-culturally. Drive CQ involves interest in experiencing other cultures and the extent to which you think you are capable of interacting effectively with people who have different cultural backgrounds. It includes the intrinsic value that you place on diverse interactions—the enjoyment and sense of satisfaction (intangible benefits) people get personally when interacting with those who are different culturally from yourself. It includes the extrinsic value (tangible benefits) that you derive from diverse interactions—the instrumental benefits you get when interacting with those who are different culturally from yourself. Lastly, it includes a people's sense of confidence that they can function effectively in different cultural settings or in diverse cultural settings where people have cultural backgrounds that are different from your own.

- *What's my level of confidence and motivation for this cross-cultural situation? If it's lacking, what can I do to increase it?*

■ **Step 2. Knowledge (Cognitive CQ)** is understanding cross-cultural issues and differences. It is a person's knowledge of how cultures are similar and how cultures are different. It includes knowledge about cultural universals (for example, all cultures have language, values, symbols, rituals) and about unique cultural characteristics (for example, unique values, social interaction norms, religious beliefs, economic and legal systems, aesthetic values). The point is not to be an expert on every culture but to understand core cultural differences and their effects on everyday business.

- *What cultural understanding do I need for this cross-cultural situation?*

■ **Step 3. Strategy (Metacognitive CQ)** is the degree to which people are mindful and aware when they interpret cross-culturally and make sense of culturally diverse experiences. Strategy CQ is awareness that

individuals have different cultural value orientations and these different orientations influence perceptions, sense-making, motivation, and behavior. It includes thinking and strategizing before an encounter, checking assumptions during an encounter, and adjusting mental maps when actual experiences differ from expectations.

- *What do I need to plan in order to work cross-culturally effectively?*

■ **Step 4. Action (Behavioral CQ)** is the extent to which people appropriately change their verbal and nonverbal actions when they interact cross-culturally. It is the capability to change behavior to fit other cultures. This requires having a flexible repertoire of responses to suit various situations while still remaining true to one's self. Action CQ includes having and using a flexible range of non-verbal behaviors (that is, body language, physical gestures, facial expressions); having and using a flexible range of verbal behaviors (that is, accent, tone, expressiveness); modifying typical behavior, based on cultural differences, to put others at ease; and changing both verbal and nonverbal actions to fit the specifics of particular cultural interactions or settings.

- *What behaviors, such as verbal and nonverbal communication, should I adapt for this cross-cultural situation?*

These four dimensions can be used by leaders as a four-step cycle for developing cultural intelligence both over the long haul and in case-by-case situations. Imagine using this process as a leader preparing to work with one cultural group (ethnic, social group, generational) in your church.

The four step cycle offers a promising way to move CQ from theory to practice. We can continually move through the four steps at a macro level in thinking about our overall leadership across a diversity of situations. And we can work through the loop even on the fly while engaging in cross-cultural conversations.

Cultural intelligence is an essential skill for twenty-first century ministry leaders. It is what we need when we work with people from different cultural contexts, whether they're across the street

or multiple time zones away. Cultural intelligence is needed when pastoring a church or leading faith formation in multicultural America, leading a ministry that serves various generational cultures, participating in short-term mission trips, or figuring out the organization dynamics of ministry where we serve.

Works Cited

Livermore, David. *Cultural Intelligence: Improving Your CQ to Engage Our Multicultural World*. Grand Rapids: Baker Academic, 2009.

Assessment Tool

Use the following assessment tool to starting thinking about your own CQ. Identify a particular culture in your church community as a frame of reference: ethnic, generational socio-economic, and so on. Review the description of the four dimensions of cultural intelligence before you begin. Rate yourself on the following scale: 1 = none of this fits me, 2 = some of this fits me, 3 = most of the description fits me, 4 = all of this description fits me.

CQ Drive

1 2 3 4

I am motivated to learn and adapt to new and diverse cultural settings. I enjoy meeting people of different cultural backgrounds. I am confident in my adaptive abilities to perform in multicultural situations.

CQ Knowledge

1 2 3 4

I generally understand culture and how it affects the way people think and behave. I know about the basic ways that cultures are alike and different.

CQ Strategy

1 2 3 4

I draw on my cultural understanding to plan and interpret what's going on in a situation. I am able to monitor, analyze, and adjust my behaviors in different cultural settings.

CQ Action

1 2 3 4

I have the ability to engage in effective, flexible leadership for a task. I am able to use a variety of behaviors, such as verbal and nonverbal communication, depending on the context.

Reflect

- Which of the four dimensions of cultural intelligence are strengths for you?
- Which of the four dimensions of cultural intelligence do you need to improve?
- How can you plan for improvement?

Study

- Read: *Cultural Intelligence: Improving Your CQ to Engage our Multicultural World*. David Livermore. Grand Rapids: Baker Academic, 2009. (Includes a cultural intelligence self-assessment.)
- Read: *Leading with Cultural Intelligence: The New Secret to Success*. David Livermore. New York: American Management Association, 2010.
- Review the strategies for advancing your CQ in chapter 15 of *Cultural Intelligence* and chapter 8 in *Leading with Cultural Intelligence*.
- Watch: David Livermore's video presentation: www.youtube.com/watch?v=SMi7yhHjASQ
- Check out the resources online at Cultural Intelligence Center, <http://culturalq.com>, and at <http://davidlivermore.com/cq>.

Improving Your Cultural Intelligence

(Summarized from Chapter 15 in *Cultural Intelligence: Improving Your CQ to Engage our Multicultural World* by David Livermore, Baker Academic, 2009)

Core Commitments

Regardless of where you are in your own journey toward cultural intelligence, the following core commitments need to guide your perspective on how we think about advancing cultural intelligence in ourselves and others.

- Start the anthropological dig in your own soul. We have to first understand who we are before we can understand another.
- Root your view of the Other in the Imago Dei. If we view others as also created in the image of God it will shape how we relate.
- Seek first the Kingdom of God. We cannot separate our relating to others from our commitment to be Christians.

- Live up close. Relationships—of all sorts—are messy. You have to live in relationship, seeking to engage the Other, not just observe from a distance.

Practices for Increasing CQ

With those core commitments in mind, let's consider several practices, many of which you may already do, to enhance the development of cultural intelligence in yourself and others. Some of these practices emphasis one of the four factors more than the others, and many of them help develop two or three of the factors simultaneously.

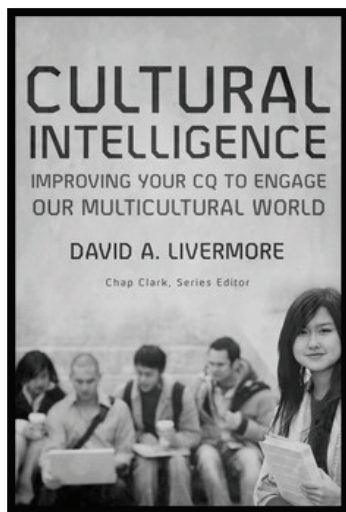
1. *Read.* Read a lot, particularly from authors of different cultural backgrounds and books on subjects different from your own experience.
2. *Go to the movies.* Films can help transform the way we see the Other. Take in films that expose you to other cultures (and languages).
3. *Eat.* Eating foods from other places with people from those places can open up a new world of experience.
4. *Journal.* Writing can play a transformative role in helping us become more aware of ourselves, others, and our surroundings.
5. *Learn a new language.* Another language allows us to see the world differently and communicate with others.
6. *Attend cultural celebrations.* A good way to learn, through experience and participation, about another culture.
7. *Go to the Pride Parade and the Mosque.* Go to gatherings that are least aligned with your own leanings and seek to understand what's behind the beliefs and behaviors of the group.
8. *Be informed.* Americans are notorious for being uninformed of global issues. Be informed.
9. *Look for the invisible.* Look for what is behind what is said or done, ask "how is the cultural informing this?"
10. *Study the Scripture with people from varied cultural perspectives.* It will open our horizons to understand how God works in the lives of others and expand our understand of God and faith.
11. *Always do mission with the "oppressed."* Mission isn't "for," but "with."
12. *Beware of culturally embedded language.* We must anticipate the impact of the words we use.
13. *Speak slowly.* Be attentive to how and in what manner we speak to others.
14. *Observe body language.* We speak in ways other than the spoken word, learn to be literate in those other expressions.
15. *Try mimicry.* Done in a respectful and thoughtful manner, mimicry can help one understand a particular culture.
16. *Find a cultural guide.* Effective cultural guides will use questions to guide us and offer support and feedback.
17. *Formal education.* College and graduate courses, workshops and other educational venues offer a solid foundation for 'real-life experience' in cross-cultural engagement.
18. *Multicultural groups and teams.* Culturally diverse groups offer you the opportunity to observe the behavior of culturally different individuals in the same context.
19. *Overseas experience.* Examining other cultures in-person, while also observing your own "from a distance," is an essential part of developing cultural intelligence.
20. *Attend the wedding ceremony of someone from another culture.* Religious services or special ceremonies help us to learn about other cultures.
21. *Read the local paper, not USA Today, when traveling.* You can gain important insights about a culture by reading about it in real-time.
22. *Walk through the grocery store.* Going through a grocery store in a given place will offer valuable insights about the culture.
23. *Seek out the other.* Look for ways to experience life with people who don't all look like you or see the world the way you do.
24. *Question, question, question.* Ask questions and listen hard.



Leading with Cultural Intelligence

David Livermore (New York: AMACON, 2010)

What is CQ? And why do leaders need it in our increasingly connected world? Why are some leaders able to create trust and negotiate contracts with Chinese, Latin Americans, and Germans all in the same day, while others are barely able to manage the diversity in their own offices? The answer lies in their cultural intelligence, or CQ. Packed with practical tools, research, and case studies, *Leading with Cultural Intelligence* breaks new ground, offering today's global workforce a specific, four-step model to becoming more adept at managing across cultures: 1) Drive—show the interest and confidence to adapt cross-culturally; 2) Knowledge—understand how differences such as religion, family, education, legal, and economic influences affect the way people think and behave; 3) Strategy—monitor, analyze, and adjust plans in unfamiliar cultural setting; and 4) Action—choose the right verbal and nonverbal behaviors, depending on context. Practical and insightful, this indispensable guide shows leaders how to connect across any cultural divide, including national, ethnic, and organizational cultures.



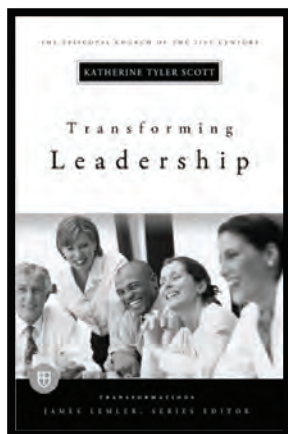
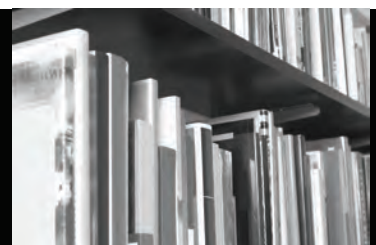
Cultural Intelligence: Improving Your CQ to Engage Our Multicultural World

David A. Livermore (Grand Rapids: Baker Academic, 2009)

As twenty-first-century society grows increasingly complex, pluralistic, and multicultural, it behooves Christians to communicate effectively between and among diverse populations. Research indicates that missions often fail because of cultural collision and lack of empathy and understanding between different peoples. David Livermore proposes a meta model—based on sound research principles and social science methodology—for helping Christians intelligently navigate the multicultural maze in *Cultural Intelligence*. The much-needed skill of Cultural Intelligence (CQ) both at home and abroad is the ability to work effectively across national, ethnic, and even organizational cultures. Livermore explains that CQ is not simply learning how to externally modify behavior but is based on inward transformation. His work is replete with assessment tools, simulations, case studies, and reflective exercises.

Resources

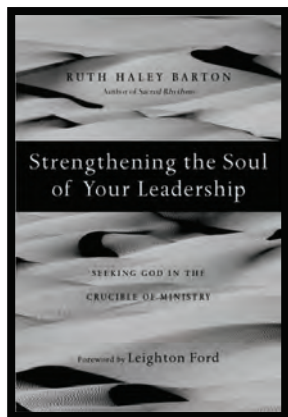
Christian Leadership



Transforming Leadership

Katherine Tyler Scott (New York: Church Publishing, 2010)

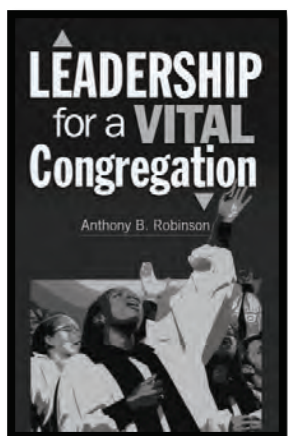
The times in which we live demand the moral responsibility of accurately reading the realities of different and emerging context. Ministry and authority are no longer resident in just one individual. Clergy and laity share responsibility for leadership and ministry; all share responsibility for the wise and judicious use of their God-given authority. Power is not just perceived as the possession of a few; it is not the currency of many. According to Katherine Tyler Scott, it is this new view of leadership that will enable the church to grow in strength and stature.



Strengthening the Soul of Your Leadership

Ruth Haley Barton (Downers Grove: IVP, 2008)

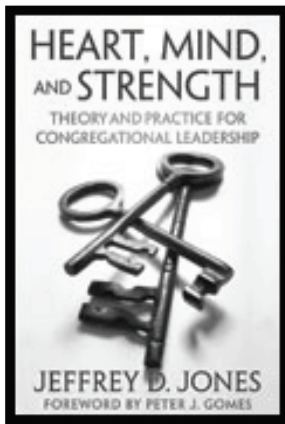
Do you find yourself busy ministering to others and helping them experience God, but never finding time to be with God yourself? The demands of ministry can make you think you have to choose between helping others to be formed spiritually or setting aside time for your own spiritual growth. With a never-ending list of people and decisions that need your attention, often your own soul suffers, growing parched and fatigued. Focusing on your spiritual formation is often the best choice you can make for yourself and for those you lead. In *Strengthening the Soul of Your Leadership*, spiritual director Ruth Haley Barton reveals the urgency of making your own growth priority in order to serve and lead well in long-term ministry. But she doesn't stop there. Knowing the demands of ministry, Barton helps you establish daily formational rhythms and soul-nurturing practices to ensure your soul gets the nourishment it needs. Here is an invitation that frees you to lead with wisdom and strength as you are led and formed by the Holy Spirit and equipped for even more powerful ministry.



Leadership for Vital Congregations

Anthony B. Robinson (Cleveland: Pilgrim Press, 2006)

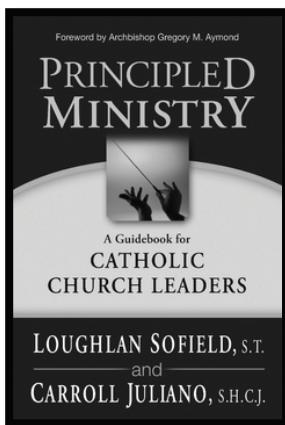
Leadership for Vital Congregations is an essential leadership tool for church leaders who wish to revitalize their leadership style and approach in order to become more effective leaders. It offers functional strategies to lead; information on developing as a spiritual leader; and ways in which the congregation can understand the importance of leadership. Chapters include: Leaders: Who Are They and What Do They Do?, Enriching our Frameworks and Languages of Leadership, Pastoral Leadership: Seven Strategies, Developing Spiritual Leaders, Roles and Responsibilities of a Congregation in Supporting Leadership, What Keeps You Going?, Leadership as a Spiritual Practice



Heart, Mind, and Strength: Theory and Practice for Congregational Leadership

Jeffrey D. Jones (Herndon: Alban Books, 2008)

Leadership, observes Jeffrey Jones, is never about you. Leadership, Jones also insists, is always about you—Christ’s disciple, part of the system, an individual with your own anxieties and a personal life that shapes both your personhood and your relationships. *Heart, Mind, and Strength* is about dealing with the tension between these two realities. What we know is important. So is who we are—maybe even more so. Jones shares both theoretical and practical insights that will inform the “what” and influence the “who” of your leadership in transformative ways. Jones organizes the book around the daily practices of leadership, treating it as both a skill and an art. *Heart, Mind, and Strength* will enhance your practice of ministry by providing well-grounded theory related to the practical concerns you encounter in the daily work of balancing what you know with who you are.



Principled Ministry: A Guidebook for Catholic Church Leaders

Louglan Sofield and Carroll Juliano (Notre Dame: Ave Maria Press, 2011)

More than a “how-to” leadership guide *Principled Ministry* offers real-life examples of principled ministers who are serving the Catholic Church and invites readers to incorporate these disciplines into their own leadership style. Expanding on *The Collaborative Leader*, their foundational work on collaborative ministry, the authors offer thirty principles for effective, spiritually healthy, mission-focused ministry. These disciplines include: 1) set boundaries; 2) facilitate, don’t dominate; 3) think developmentally; 4) be comfortable with conflict; and 5) avoid ambiguity. Arranged into five chapters, the principles are explored in light of the best servant-leadership theory and praxis and situated within a variety of contexts and ministerial settings. An ancillary workbook, available for free download, helps both the apprentice and well-seasoned leader immediately apply the lessons and incorporate the disciplines presented in this practical book.



Transforming Leadership: A New Vision for a Church in Mission

Norma Cook Everist and Craig L. Nesson (Minneapolis: Fortress Press, 2008)

Transforming Leadership sets forth the core values and leadership practices that can bring fundamental transformation to the life of the local church. Based on experience and research, Everist and Nesson explore three dimensions of transforming leadership: (1) how leaders are formed and transformed, (2) how transforming leadership can renew congregations and focus their ministry to do justice, and (3) how congregations can be transformed by empowering all members to use their gifts for ministry. Transforming leadership is deeply rooted in theological conviction, expressed in genuine love for the people one serves, and cultivated through wise practices. The book grapples with challenging congregational dynamics, promotes the ministry of all the baptized, and provides vision for the lasting renewal of the church in mission.