

ACCOMPANYING LEADERS THROUGH CHANGE

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This presentation will explore what can we learn from research and experience on the most effective practices and processes to facilitate change in parish communities; and the ways we can support, encourage, and resource the innovators and “change makers” who are engaged in change initiatives.

- Part 1. How You Can Assist
- Part 2. Shifting Understanding of Leadership
- Part 3. Managing Transitions
- Part 4. Facilitating Change
- Part 5. Focusing on Metrics

How do I get rid of the fear?

Alas, this is the wrong question.

The only way to get rid of the fear is to stop doing things that might not work, to stop putting yourself out there, to stop doing work that matters.

No, the right question is, "How do I dance with the fear?"

Fear is not the enemy. Paralysis is the enemy.

(Seth Godin)

How Can You Assist?

1. **Coaching**: focused on the person—leadership and performance—in a change initiative
2. **Consulting**: focused on knowledge and processes of a transition or change initiative (facilitation)
3. **Training**: focused on developing knowledge and skills in the leader and team(s)
4. **Resourcing**: focused on accessing the resources needed: people, materials, programs, activities, etc.
5. **Evaluating**: focused on assessing the situation, measuring outcomes, etc.

How Can You Assist?

1. Facilitate the exploration of needs, motivations, desires, skills and thought processes to assist the individual in making real, lasting change.
2. Use questioning techniques to facilitate client's own thought processes in order to identify solutions and actions rather than takes a wholly directive approach
3. Support the client in setting appropriate goals and methods of assessing progress in relation to these goals
4. Observe, listen and ask questions to understand the client's situation
5. Creatively apply tools and techniques which may include one-to-one training, facilitating, counseling & networking.
6. Encourage a commitment to action and the development of lasting personal growth & change.
7. Maintain unconditional positive regard for the client, which means that the coach is at all times supportive and nonjudgmental of the client, their views, lifestyle and aspirations.

How Can You Assist?

8. Ensure that clients develop personal competencies and do not develop unhealthy dependencies on the coaching or mentoring relationship.
9. Evaluate the outcomes of the process, using objective measures wherever possible to ensure the relationship is successful and the client is achieving their personal goals.
10. Encourage clients to continually improve competencies and to develop new developmental alliances where necessary to achieve their goals.
11. Work within their area of personal competence.
12. Possess qualifications and experience in the areas that skills-transfer coaching is offered.
13. Manage the relationship to ensure the client receives the appropriate level of service and that programs are neither too short, nor too long.

Thinking about Leadership Today

Leadership 1.0 (Susan Lang)

- ★ **Organizational:** Think hierarchical organization flow-charts. A strong emphasis was placed on putting the correct structure in place.
- ★ **Centralized:** Denominations were generally the central holders of resources and information, which they dispersed from a given location.
- ★ **Authority-based:** Established authorities and expertise provided the answers to questions.
- ★ **Agenda-driven:** Ministry grew out of a set agenda and often used a “command and control” model.

Thinking about Leadership Today

Leadership 2.0 (Susan Lang)

- ★ **Relational**—The focus is on developing and nurturing relationships and links.
- ★ **Decentralized**—Resources are distributed throughout a networked congregation and ministry. Each person is recognized as a connector to his or her own resources and networks.
- ★ **Collaborative**—Collaboration builds on conversations and recognizes that we are all teachers, we are all learners, and we are always stronger together than we are alone.
- ★ **Focused on Emergence**—Recognizes that discernment is important for leaders, because God’s presence and action among us emerge and often change over time.

Managing Transitions

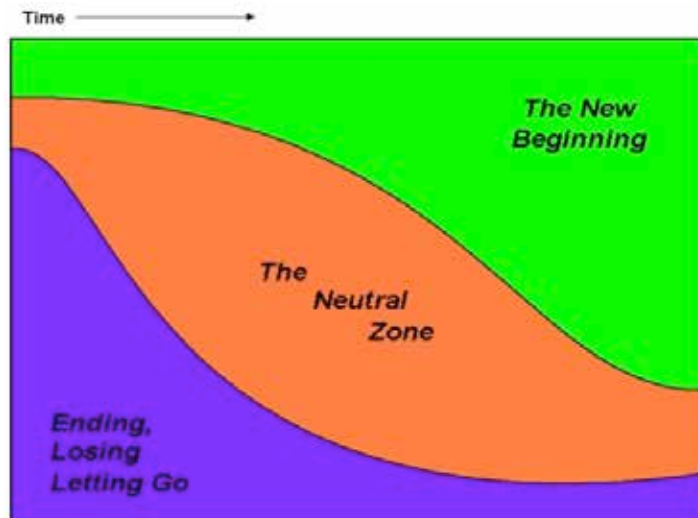
It isn't the changes that will do you in; it's the transitions. They aren't the same thing.



Change is situational.

Transition, on the other hand, is psychological; it is a three phase process that people go through as they internalize and come to terms with the details of the new situation that the change brings about.

“Transition begins with an ending and finishes with a beginning” (William Bridges)



The three phases of transition

William Bridges, Managing Transitions, USA, 2003

Managing Transitions: Endings

Transition starts with an ending. This is paradoxical but true. This first phase of transition begins when people identify what they are losing and learn how to manage these losses. They determine what is over and being left behind, and what they will keep. These may include relationships, processes, team members or locations.

- * What is actually ending, and who is losing what?
- * Acknowledge losses openly.
- * Work through the signs of grieving
- * Define what's over and what isn't
- * How will individual's behavior and attitudes change?
- * Mark endings and treat the past with respect

Change and Loss (Heifetz)

- * People don't resist change per se.
- * People love change when they know it's a good thing. (No one gives back a winning lottery ticket.)
- * People resist loss. When change involves real or potential loss, people hold on to what they have and resist the change.
- * A key to leadership is the diagnostic capacity to find out the kinds of losses at stake in a situation.
- * Leadership is about assessing, managing, distributing, and providing contexts for losses that move people through these losses to a new place.

Managing Transitions: Neutral Zone

The second step comes after letting go: the neutral zone.

People go through an in-between time when the old is gone but the new isn't fully operational. It is when the critical psychological realignments and re-patterning take place. It is the very core of the transition process. This is the time between the old reality and sense of identity and the new one. People are creating new processes and learning what the new roles will be, but it's in flux and doesn't feel comfortable yet. It is the seedbed of the new beginnings that are sought.

Managing Transitions: Neutral Zone

- * A difficult time. . .
 - * Anxiety rises and motivation falls
 - * People are overloaded
 - * Polarization: some want to move ahead, others hold on
- * A creative time. . . innovation, creativity
- * Normalize the neutral zone – think Moses and the people in the desert for 40 years
 - * Time to “take stock”
 - * Time to live with ambiguity
 - * Time for learning and experimentation – testing new ideas and projects
 - * Time for developing new patterns

Managing Transitions: New Beginnings

Beginnings involve new understandings, new values and attitudes.

Beginnings are marked by a release of energy in a new direction – they are an expression of a fresh identity. Well-managed transition allows people to establish in new roles with an understanding of their purpose, the part they play, and how to contribute and participate most effectively. They are reoriented and renewed.

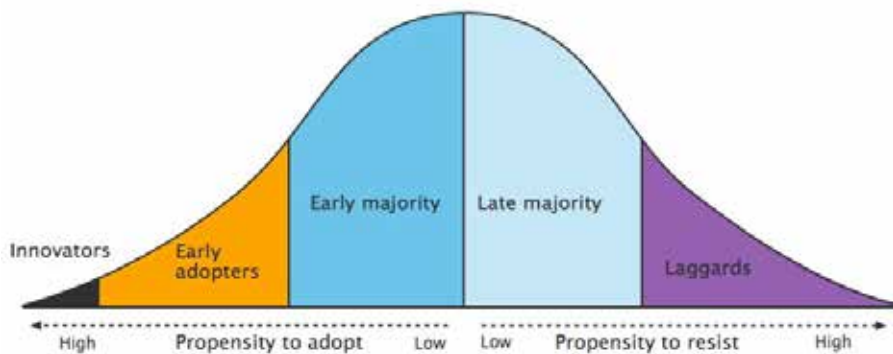
Managing Transitions: New Beginnings

- ★ Deal with the promise and fear of new beginnings
- ★ New beginnings. . . .
 1. Clarify and communicate **Purpose**
 2. After purpose, a **Picture**
 3. Create a **Plan**
 4. Identify the **Part** people play
- ★ Reinforce New Beginnings
 1. Be consistent
 2. Ensure quick success
 3. Symbolize the new identity
 4. Celebrate the success

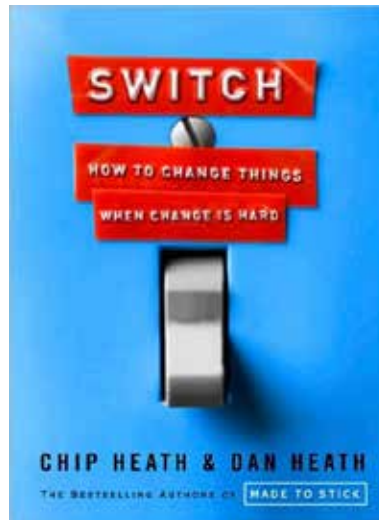
Determine Readiness for Change

1. **Take the temperature:** get a realistic picture of the internal climate of the organization
2. **Identify the hurdles:** identify and address the cultural barriers to change
3. **Talk to the people in the trenches:** find out about real needs, real problems, and potential solutions
4. **Be prepared for push-back:** resistance to change is natural and inevitable

Rogers Diffusion of Innovation



Facilitating Change



A Framework for Change

Cognitive

- 1. Follow the bright spots:** investigate what's working and clone it.
- 2. Script the critical moves:** don't think big picture, think in terms of specific behaviors.
- 3. Point to the destination:** change is easier when you know where you're going and why it's worth it.

A Framework for Change

Affective

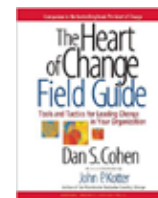
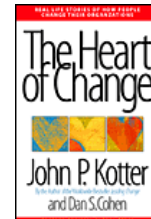
1. **Find the feeling:** knowing something isn't enough to cause change. Make people feel something.
2. **Shrink the change:** break down the change until it no longer spooks people.
3. **Grow your people:** cultivate a sense of identity and instill the growth mindset.

Framework for Change

Environment

1. **Tweak the environment:** when the situation changes, the behavior changes. So change the situation.
2. **Build habits:** when behavior is habitual, it's "free." Look for ways to encourage habits.
3. **Rally the herd:** behavior is contagious. Help it spread.

Facilitating Change



People change what they do less because they are given **analysis** that shifts their **thinking** than because they are shown a **truth** that influences their **feelings**.

(John Kotter)

EIGHT STEPS TO TRANSFORMING YOUR ORGANIZATION

1 Establishing a Sense of Urgency
• Examining market and competitive realities
• Identifying and discussing crises, potential crises, or major opportunities

2 Forming a Powerful Guiding Coalition
• Assembling a group with enough power to lead the change effort
• Encouraging the group to work together as a team

3 Creating a Vision
• Creating a vision to help direct the change effort
• Developing strategies for achieving that vision

4 Communicating the Vision
• Using every vehicle possible to communicate the new vision and strategies
• Teaching new behaviors by the example of the guiding coalition

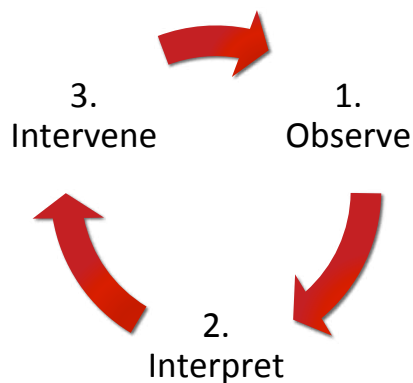
5 Empowering Others to Act on the Vision
• Getting rid of obstacles to change
• Changing systems or structures that seriously undermine the vision
• Encouraging risk taking and nontraditional ideas, activities, and actions

6 Planning for and Creating Short-Term Wins
• Planning for visible performance improvements
• Creating those improvements
• Recognizing and rewarding employees involved in the improvements

7 Consolidating Improvements and Producing Still More Change
• Using increased credibility to change systems, structures, and policies that don't fit the vision
• Hiring, promoting, and developing employees who can implement the vision
• Reinvigorating the process with new projects, themes, and change agents

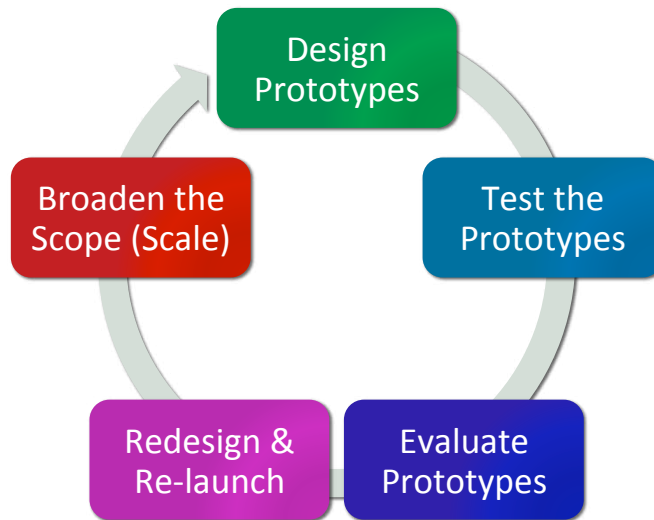
8 Institutionalizing New Approaches
• Articulating the connections between the new behaviors and corporate success
• Developing the means to ensure leadership development and succession

The Adaptive Intervention Process (Heifetz)

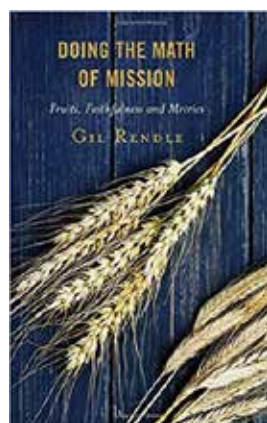


- 1. Observing** events and patterns around you;
- 2. Interpreting** what you are observing (developing multiple hypotheses about what is really going on; and
- 3. Designing** interventions based on the observations & interpretations to address the adaptive challenge you have identified.

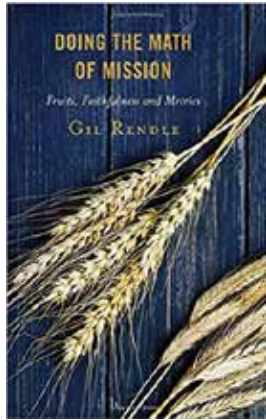
Designing Interventions



Focusing on Metrics



Doing the Math of Mission



- ★ Counting – what are you counting?
 - ★ Use the right verbs
 - ★ Count more comprehensively
- ★ Measuring: what are you measuring?
 - ★ Impact on people's lives
 - ★ Change that can be measured over time

Focusing on Metrics

Impact (or outcomes) describes what happens to people by virtue of their participation in project activities and results. Most projects set out to change what people think and do; that is, projects seek to impact people's attitudes and knowledge as well as encourage people to develop new skills and behaviors.

- ★ Initial or immediate impact
 - ★ Intermediate impact
 - ★ Long-term impact
- ✓ How will participants benefit from and be affected or changed by participation in the project?

Others can better write about Nelson Mandela's impact on the world stage, on how he stood up for the dignity of all people and on how he changed our world.

For those that seek to make a change in the world, whether global or local, one lesson of his life is this:

You can.

You can make a difference.

You can stand up to insurmountable forces.

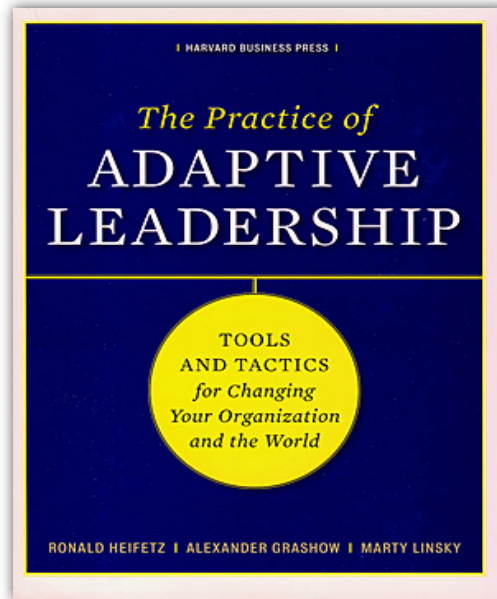
You can put up with far more than you think you can.

Your lever is far longer than you imagine it is, if you choose to use it.

If you don't require the journey to be easy or comfortable or safe, you can change the world.

(Seth Godin)

BACKGROUND MATERIAL
ACCOMPANYING LEADERS
THROUGH CHANGE



Leadership is the activity of mobilizing people to tackle tough challenges (problems) and do the adaptive work necessary to achieve progress and thrive.

(Ronald Heifetz and Marty Linsky)

Adaptive Leadership Principles

- ***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.

Adaptive Leadership Principles

- ***Successful adaptive changes build on the past rather than jettison it.*** 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.

Adaptive Leadership Principles

- ***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 along the way for the next set of experiments.

Adaptive Leadership Principles

- ***New adaptations significantly displace, reregulate, and rearrange some old DNA.*** Leadership on adaptive challenges generates loss. Learning is often painful. Leadership requires the diagnostic ability to recognize these losses and the predictable defensive patterns of response that operate at the individual and systemic levels. It requires know-how to counteract these patterns.

Adaptive Leadership Principles

- **Adaptation takes time.** 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.

Adaptive Work as Spiritual Work

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' leader alone will meet this challenge. It involves our own changes of minds and hearts."

(Anthony Robinson, Leadership for Vital Congregations)

Distinguishing Technical Problems from Adaptive Challenges

- **Technical problems** (even though they may be complex) can be solved with knowledge and procedures already in hand.
- Easy to identify.
- Require change in just one or a few places; often contained within organizational boundaries
- Everyday, people have problems for which they do, in fact, have the necessary know-how and procedures—*technical problems*.

Distinguishing Technical Problems from Adaptive Challenges

- **Adaptive challenges** are situations for which solutions lie outside the current way of operation.
- Difficult to identify (easy to deny). People often resist even acknowledging adaptive challenges
- Require experiments, new discoveries, and adjustments from numerous places in the organization.
- Without learning new ways—changing attitudes, values, and deep-seated behaviors—people cannot make the adaptive leap necessary to thrive in the new environment.
- Calls for changes of heart and mind—the transformation of long-standing habits and deeply held assumptions and values.

Adaptive Change

- ❑ People don't resist change per se.
- ❑ People love change when they know it's a good thing. (No one gives back a winning lottery ticket.)
- ❑ People resist loss. When change involves real or potential loss, people hold on to what they have and resist the change.
- ❑ The common factor generating adaptive failure is resistance to loss. A key to leadership, then, is the diagnostic capacity to find out the kinds of losses at stake in a situation.
- ❑ Adaptive leadership almost always put you in the business of assessing, managing, distributing, and providing contexts for losses that move people through these losses to a new place.

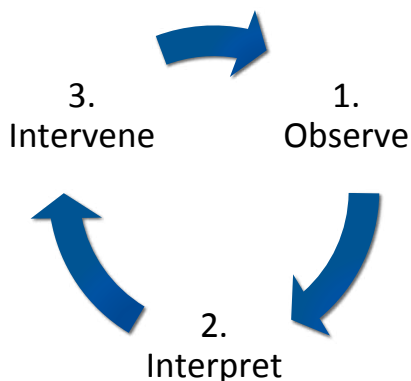
Adaptive Change

- ❑ Adaptive leadership is a process of conservation and loss.
- ❑ "Of all that we care about, what must be given up to survive and thrive going forward?"
- ❑ "Of all that we care about, what elements are essential and must be preserved into the future, or we will lose precious values, core competencies, and lose who we are?"
- ❑ As in nature, a successful adaptation enables an organization or community to take the best from its traditions, identify, and history into the future.

You May Be Facing an Adaptive Challenge If...

- the solution requires operating in a different way than you do now. . .
- the problem AND the solution require learning. . .
- the solution requires shifting the authority and responsibility to the people who are actually affected. . .
- the solution requires some sacrifice of your past ways of working or living. . .
- the solution requires experimenting before you're sure of the answer. . .
- the solution will take a long time. . .
- the challenge connects to people's deeply held values. . .

The Adaptive Intervention Process



- 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 & interpretations to address the adaptive challenge you have identified.

An Adaptive Design Process

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. 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.

An Adaptive Design Process

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. The key is to stay present and keep listening.

An Adaptive Design Process

ANALYZE THE FACTIONS that begin to emerge. As people begin to discuss the intervention, pay attention to who seems engaged, who starts using the new 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.

An Adaptive Design Process

9. 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.

An Adaptive Design Process

- **Get allies.** You need to share the burden of keeping the work at the center of people's attention.
- **Understand.** Try 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.
- **Threat & Loss.** 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.