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Instructor Guides, TIGERS ADVANCE

Trailblazers: Provost's Mentoring Initiative for Faculty

**Session 2: Mentoring (Hierarchical & Mutuality) & Adaptive
Leadership**

Cynthia M. Sims, Angela D. Carter, and Stephen Brown III

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Introduction

TIGERS ADVANCE: Transforming the Institution through Gender Equity, Retention and Support, is a National Science Foundation (NSF) funded innovative and systematic institutional transformation approach to reduce gender inequality and improve opportunities for all early and mid-career faculty at Clemson, both men and women.

Course Overview

Inclusive of all science, technology, engineering and mathematics (STEM) disciplines, TIGERS ADVANCE is the result of a comprehensive institutional assessment of the barriers that hinder the recruitment, advancement and retention of Clemson's women and minority faculty; a thorough assessment of Clemson's history, culture and climate; an extensive review of lessons learned from ADVANCE institutions; and the tight integration of social science research with project activities to inform and support institutional transformation.

Session Organization

Start	Activity	Who
11:30	Lunch	All participants/ guest speakers/ executive mentors
12:00	Session Introduction/ Review need to complete surveys	
12:05	Speed Mentoring Debrief and address next steps – Qualtrics survey; remind them of posts on Canvas, deadline	All
1:10	Hierarchical mentoring / mutuality Introduce the Executive Mentoring Form Role play executive mentor session introduction form	
1:30	Break	All
1:30	Small Group Discussions <ul style="list-style-type: none"> Leadership/ Action Research Methodology (Outcome: leadership project title, why is it important, how it relates to gender equity, who is on the team, 3 minute report out) 	
2:30	Adaptive Leadership with an example – Clemson child care center	Angie and Guest Speaker
3:15	How adaptive leadership applies to their leadership projects; identify technical versus adaptive challenge	All
3:45	Break	All
3:55	Peer Mentoring	
4:20	Next Steps	All

	Past out the executive summary to share with Executive Mentor	
4:30	Closing	

Target Audience

The target audience for Trailblazers is early and mid-career faculty members at Clemson University.

Course Goal and Outcomes

This ADVANCE Trailblazers session provides Trailblazers the opportunity to meet with and start to decide which executive mentors they want to work with.

Course Goal

Identify the overall purpose of the course and key points covered.

Course Outcomes

At the end of this sessions, participants will be able to:

- Identify their top three mentor/protégé matches
- Compare and contrast descriptions of gender equity
- Examine how leaders are perceived differently based on gender
- Describe how to use action research in their leadership project
- Identify different mentoring approaches and methods
- Practice peer mentoring

Host Responsibilities

The requirements below should be carried out by the agency that requests the course session and are as follows:

Audiovisual Equipment Requirements

Visual aids for this course consist of PowerPoint slides, video clips, and crash diagrams. The following audiovisual equipment is necessary for delivery of this course:

- Computer to display PowerPoint slides, videos, etc.
- Projector compatible with computer
- Electronic device to advance PowerPoint remotely
- Microphone
- Timer

All equipment should be placed in the room for the instructors to check at least one hour prior to the start of the course. The host building should provide technical assistance

during this time and contact information for technical assistance during the presentation of the course.

Room Requirements

The room should be large enough to accommodate workspace and chairs for up to 30 participants and 2 instructors plus the aforementioned equipment—a large conference room or classroom.

Instructors should be able to arrange the classroom as they deem most appropriate given the exact number of participants. (The ideal arrangement allows participants to interact with the instructors and in small groups, i.e. many round tables with 5-8 participants per table.) All participants should be able to see the screen and instructors; however, participants and instructors should be able to move about the room without obstruction.

A preparation table and presentation table or podium should be provided for the instructors. The room should be in a quiet area and have a lighting system that permits convenient dimming of the lights, especially where the screen is located.

Training Coordinator's Responsibilities

The local coordinator is responsible for preparing the site prior to the instructor's arrival. Below is a checklist of the items the local coordinator should prepare prior to the instructor's arrival. It is recommended that the instructors contact the local coordinator to ensure these steps have been taken.

Training Site

Before the instructors' arrival, the local coordinator should verify the following accommodations are in place for the training site:

- Selection of a training room is critical to the success of the course. Great care should be taken to select a room that will not be overcrowded, too hot or too cold, or subject to outside distractions. The instructor should contact you with any specific requirements for the training facility.
- Reserve a training room for the duration of the course.
- Visit the classroom to make certain it meets all of the instructor's requirements.

Other considerations for the training room:

- Heat or air conditioning-find out if the instructor can control these
- Adequate shape and size. No poles or obstructions
- Seating arrangements
- Away from kitchen, construction area or other noise distractions
- Electrical outlets
- Lighting controls – Almost every training course uses visual aides that require a projection screen. It is important to have a room where lighting can be controlled to prevent glare on the screen while not placing the room in total darkness.

Since a PowerPoint presentation will be used during instruction, make sure to consider the following room accommodations:

- Will shades completely darken all windows?
- Can the lights be selectively dimmed when showing the presentation?
- Will overhead lights shine directly on the screen?
- Can a bulb be removed above the screen or will the whiteboard be too dark?

Participants and Instructors

- Participants and instructors should be:
 - Informed of course starting and ending times
 - Advised on room location and whether it's the same for every session
 - Told whether food will be served or not and told of the spread
- Participants should also be informed that notebooks will be provided as well as folders and a binder to help organize received material
- Participants should bring their own writing utensil

Final Arrangements

One (1) week before the course:

- Prepare directional signs to classroom.
- Determine if snacks are available.
- Make sure post lesson surveys are created
- Check over PowerPoints to make sure they are updated
- Make sure all links to videos are working properly.

Day of the course:

- Set-up the classroom.
- Organize the participant materials.
- Set up directional signs
- Test all equipment.
- Confirm with any food vendors

During the course:

- Let the instructor know whom to contact if he/she needs assistance.
- Check with the instructor at least once an hour to resolve any problems.
- Follow the agenda provided to the participants

After the course:

- Make sure all participants complete post lesson survey
- Make sure to collect surveys and attendance sheet
- Break down and remove any and all equipment



Trailblazers: Provost's Mentoring Initiative for Faculty



2019-2020



Actions	Facilitator
Think	The objective here is to get everyone's attention and begin to engage them in the day's activities.
Do	Stand at the front of the room, ready to go to the next slide.
Say	Something simple that introduces the session and get's their attention



Speed Mentoring & Adaptive Leadership

Session 2



Actions	Facilitator
Think	The objective here is to begin to get people excited about the two big pieces of this session: Speed mentoring and adaptive leadership
Do	Prepare something to say that gives a brief summary of each activity
Say	A blurb about what speed mentoring is and how it'll be similar to speed dating and a quick piece about adaptive leadership. This doesn't need to be too in depth since they will both be covered more in depth later in the session. Info on both pieces can be found later in the instructor guide.



Agenda, October 4, 2019

Start	Activity	Who
11:30	Lunch	All participants/ guest speakers/ executive mentors
12:00	Session Introduction/ Review need to complete surveys	
12:05	Speed Mentoring – Executive mentors stay at table and Trailblazers move. (3 Executive mentors/ 3 trailblazers, one minute introductions); TBs move every 5 minutes. Done 10 times (40 minutes) Debrief and address next steps – Qualtrics survey; remind them of posts on Canvas, deadline	All
12:55	Break	
1:00	Small Group Discussions <ul style="list-style-type: none"> • Leadership/ Action Research Methodology (Outcome: leadership project title, why is it important, how it relates to gender equity, who is on the team, 3 minute report out) 	
1:45	Adaptive Leadership with an example – Clemson child care center	Angie and Guest Speaker - Julia Brumaghim
2:45	How adaptive leadership applies to their leadership projects; identify technical versus adaptive challenge	All
3:45	Break	All
3:55	Hierarchical mentoring / mutuality Introduce the Executive Mentoring Form Role play GROW executive mentor session introduction form Pair Mentoring using Grow (Executive Mentor and Protege)	
4:20	Next Steps Pass out the executive summary to share with Executive Mentor	All
4:30	Closing	

4

Actions	Facilitator
Think	The objective here is to lay out what the session will look like
Do	Make sure the agenda is prepared and that any guest speakers/activities are ready to go
Say	Simply read through the agenda

Speed Mentoring



Actions	Facilitator
Think	The objective here is for mentors and mentees will use this time to figure out who they want to be paired up with.
Do	<p>There are two parts that all mentors and mentees need to complete. The first is their prework, which consists of creating a 30-60 second elevator speech. The purpose of this elevator speech is to help sell yourself to the other mentors/mentees. The mentee’s speech should focus on their interests and what they are hoping to gain from having a mentor. The mentor’s speech should focus on their interests, their experience as a mentor, and what skills they have to offer as a mentor.</p> <p>The second part of the work is the actually speed mentoring. Each table will have two mentors and three mentees. First, each of the three mentees will give their elevator speech. Then, the two mentors will give their elevator pitch. After five minutes, the mentees will move to the next table. This should be done enough times so that every mentor and every mentee have heard each other’s speeches. You as the facilitator are in charge of keeping track of time and making sure everyone moves quickly to the next table.</p>
Say	Simply explain the above directions to the participants and let them go at it. The only time you should talk once the speed mentoring gets started is to let people know when it’s time to move tables.



The Practice of Adaptive Leadership



Actions	Facilitator
Think	The objective here is to introduce adaptive leadership to the group.
Do	Stand at the front of the room, ready to go to the next slide.
Say	Something simple that introduces adaptive leadership, like, “Now we are going to start talking about adaptive leadership” (but make it your own).



“What if we don’t change at all ...
and something magical just happens?”



Actions	Facilitator
Think	The objective here is to warm up the group with a comic about adaptive leadership
Do	Give the group some time to read and process the comic
Say	<p data-bbox="370 348 1409 722">A vital part of preparing people to exercise leadership is the unraveling of leadership and authority. A position of authority does not confer the ability to lead. In fact, many practitioners of Adaptive Leadership would argue real leadership is never authorized, since it always involves change and, in that sense, a failure to meet expectations. People may be rewarded for leadership when in fact they have done the opposite, which is to allow accepted practices and attitudes to remain undisturbed.</p> <p data-bbox="370 772 1409 1108">Some persons may be predisposed to exercise leadership, but leadership is best understood as a form of behavior, one that might be exercised by anyone, rather than as a permanent persona. Whether a person is junior or senior, holds a position of authority or no official position, we are all called upon to exercise technical competence and managerial or administrative ability, but when an adaptive challenge presents itself, leadership is required.</p> <p data-bbox="370 1159 1360 1453">Developed by Ronald Heifetz, founding director of the Center for Public Leadership at Harvard University’s John F. Kennedy School of Government (MA), adaptive leadership provides a road map for helping leaders navigate the most difficult problems in a sustainable manner. According to this theoretical model, leaders often encounter two types of organizational challenges: Technical and Adaptive.</p>



Learning Objectives

- > Differentiate between Technical and Adaptive Challenges
- > Recognize and describe the Adaptive Leadership Framework
- > Distill lessons from a live Adaptive leadership case study
- > Review tools that can be used in exercising leadership
- > Identify a personal leadership challenge you face in your role



Actions	Facilitator
Think	The objective here is to introduce the learning objectives for the presentation. This allows the group to understand where we are going and what they should glean from this presentation.
Do	Give the group a few seconds to read over the objectives
Say	Read off the objectives



An Adaptive Story



Actions	Facilitator
Think	The objective here is to tell a story to the group to get them thinking about adaptive leadership. This story will lead in to the difference between technical and adaptive challenges
Do	Make sure you have a story in mind to tell the group. The story should have a clear technical and adaptive solution to it (explained on the next slide). The slide should also be edited to reflect the general idea of your story.
Say	<p>Tell the story. An example of a story is below. But make sure to tell your own!</p> <p>My mother and father are in their early 70’s—73 to be exact. They have a few health challenges, as you can imagine, but nothing too debilitating. I should mention that I am the second oldest of 5 children, and the oldest girl. My parents have 10 grandchildren spread over 4 states, and they like to visit often. Some time ago, we began noticing new scrapes on their car each time they visited. All fender benders. I even was in the car for one where my Mom just backed into a pole she didn’t see at all. She begged me not to tell Dad because it was her second fender bender in a month, and my Dad also misjudged the mailbox and scraped the side of the car. In total, they had six scrapes in about 6 months, and the insurance company dropped them because of the risk.</p>



Technical & Adaptive Challenges

Kind of Challenge	Problem Definition	Solutions & Implementation	Primary Focus of Responsibility
Technical	Clear	Clear	Authority
Technical & Adaptive	Clear	Requires Learning	Authority & Stakeholder
Adaptive	Requires Learning	Requires Learning	Stakeholder>Authority

Heifetz, R., Grashow, A., & Linsky, M. (2009)



Actions	Facilitator
Think	The objective here is to get into the difference between an adaptive challenge and a technical challenge.
Do	Make sure you have a story in mind to tell the group. The story should have a clear technical and adaptive solution to it. At this point, you will be getting into the technical and adaptive pieces of your story.

Say	<p>Talk about the technical and adaptive challenges of your story. The example from the previous slide is continued below. The parts of the story in bold are NOT story specific and should be part of your story:</p> <p>One brother said a technical solution is get the car fixed. Now, one way to look at the issue is that the car needs to be taken to a garage to be repaired: the scrapes can be solved by the application of the authoritative expertise found at the garage. Another brother said we could take the keys to their car and we could get a power of attorney to do so legally.</p> <p>But an adaptive challenge is also obviously lurking below the surface. They would hate to have their independence taken away. It would also be a loss, It would rip out part of their hearts, and take away a central element of identity as independent adults. Addressing the issue solely as a technical problem would fix the car (although only temporarily, since it is likely that the trips to the garage would come with increasing frequency), or by forcibly taking the keys, but it would not get at the underlying adaptive challenge.</p> <p>Adaptive solutions require learning, critical thinking, double loop learning, thinking outside the box. Authority imposing a solution on the problem from someone who is assumed able to make changes or solve the problem. Stakeholder: those impacted by the problem. Car that has a beeper or detects changing lanes. Spokes to tell them they are close. Adaptive is getting the family to realize mom and dad are getting older how can we assist them in seeing family</p> <p>Adaptive challenges can only be addressed through changes in people’s values, beliefs, habits and loyalties. Adaptive problems can only be addressed through changes in people’s assumptions, beliefs and worldviews and through changes in priorities, habits and loyalties. They involve shedding some entrenched ways of thinking and being, tolerating disequilibria and losses, and generating the capacities needed to collectively thrive. There is no clear, linear pathway to follow when resolving adaptive challenges. Making progress on them requires going far beyond any</p>
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authoritative expertise and in particular dealing with the resistance that stems from unwillingness to face the losses that will be involved. This resistance makes adaptive leadership dangerous, and therefore rare. The table on the screen lays out some differences between technical problems and adaptive challenges. As the table implies, problems do not always come neatly packaged as either 'Technical' or 'Adaptive'. When you take on a new challenge in your education work, whether in a classroom or as an administrator or policymaker, the challenge does not arrive with a big 'T' or 'A' stamped on it. Most problems come mixed, with the technical and adaptive elements intertwined. Tell me some of the adaptive challenges in the headlines?



Actions	Facilitator
Think	The objective here is to get the group thinking about how complex issues can be
Do	Make sure you have some current hot button issues in mind. Some examples are listen below.
Say	<p>What are some of the big issues in the United States? Climate change, school shootings, teacher pay, the opioid crisis. How about in academia? Student retention, professor succession planning/retirements. And on and on. We assume that everyone here cares about leadership, and that you would not be here unless there was a gap between your aspirations and the current reality. And we also assume that as leaders, you are looking here for solutions that would be easy to apply or at least steps you could take that would likely make progress without, as the old proverb goes, breaking too many eggs.</p> <p>But leadership in education, as in any other sphere, is difficult work. The issue with the teachers in Oklahoma when you look at the headlines. Is not just about better pay. It is a multifaceted issues that cannot be solved merely by the teachers going back to work, or even getting paid more, for that matter. They are striking for resources and are victims of tax cuts that leave them with few resources. The opioid crisis would have been solved were it an easy issue. And school shootings and the NRA gun debate are not easy issues to overcome. They are adaptive issues that require different thinking.</p>



Technical Challenge

- > The problem is known
- > There is a set of procedures to deal with the problem
- > There is a hierarchy to take care of the problem
- > Authorities maintain order, provides directions , reassure people that a solutions is being found.



Actions	Facilitator
Think	The objective here is to define a technical challenge
Do	List off the technical challenge definition
Say	"In the past," Goldstein says, "the typical approach to problem-solving would be for the senior leader to bring together a few members of an executive team and brainstorm. This won't be as successful in the future. Technical challenges lend themselves to that kind of solution, but adaptive challenges require you to listen, gather your data, and identify unintended consequences that will affect other divisions."



Adaptive Challenge

- > The problem is very complex, and no adequate solution has been found
- > There is a need to adapt to a new reality
- > This requires a change in values, attitude, and behavior
- > There is a need to constantly learn and adapt
- > The people close to the problem do the work of adaptation



Actions	Facilitator
Think	The objective here is to define adaptive challenge
Do	List off the adaptive challenge definition
Say	In their book <i>21st Century Skills</i> (Jossey-Bass: 2009), Bernie Trilling and Charles Fadel, co-board members on the Partnership for 21st Century Skills, cite "creativity and innovation, critical thinking and problem solving, and communication and collaboration" as the top leadership skills needed in this century. The adaptive challenges facing higher education will require creativity and innovation, and institutions of higher education include large pools of creative, innovative minds. The challenge is to get their ideas shared



Distinguishing Technical from Adaptive Challenges

The dominant view of leadership is that the leader has the vision and the rest is a sales problem," he says. "I think that notion of leadership is bankrupt."

That approach only works for technical problems, Heifetz says, where there's a right answer and an expert knows what it is.

-Ron Heifetz



Actions	Facilitator
Think	The objective here is to talk about the difference between technical and adaptive challenges.
Do	Read the quote from the slide
Say	<p>Ronald Heifetz has been a professor of public leadership at Harvard's Kennedy School for three decades, teaching classes that have included aspiring business leaders and budding heads of state. Each year, he says, the students start his course thinking they'll learn the answer to one question: As leaders, how can they get others to follow them? Heifetz says that whole approach is wrong. "The dominant view of leadership is that the leader has the vision and the rest is a sales problem," he says. "I think that notion of leadership is bankrupt."</p> <p>That approach only works for technical problems, he says, where there's a right answer and an expert knows what it is. Heifetz trained as a psychiatrist, and he describes his view of effective leadership with an analogy from medicine. "When a patient comes to a surgeon, the surgeon's default setting is to say, 'You've got a problem? I'll take the problem off your shoulders and I'll deliver back to you a solution.' In psychiatry, when a person comes to you with a problem, it's not your job actually to solve their problem. It's your job to develop their capacity to solve their own problem."</p> <p>Many intractable political issues, such as civil war, poverty or ethnic tension are complicated, and solving them may require a whole nation of people to change their mindset. As they approach these sorts of "nontechnical" problems, Heifetz says, leaders should think less like surgeons, and more like psychiatrists. In such cases, "the people are the problem and the people are the solution," he says. "And leadership then is about mobilizing and engaging the people with the problem rather than trying to anesthetize them so you can go off and solve it on your own."</p>



Activity: Technical or Adaptive?

Identify **1** challenge faced by your department or program

Determine whether this challenge is:

- technical,
- adaptive,
- or both

Discuss the relative degree of difficulty associated with “managing” the challenge.



Actions	Facilitator
Think	The objective here is get the group to think about challenges they face in their every day lives.
Do	Give the group a few minutes to think, then pair up and discuss
Say	"Please take a minute to think about a challenge your department or program has faced. Think about whether the challenge is technical, adaptive, or both. Then, pair up and discuss with the person next to you.



Why Do Reforms Fail?

- > If we treat adaptive problems with technical fixes
- > If the people concerned turn to authorities to provide solutions
- > If we fail to understand resistance to change



Actions	Facilitator
Think	The objective here is get the group to understand the challenge of solving different challenges
Do	Read the slide
Say	<p>Over 70% of change efforts fail. That's a staggering failure rate, isn't it? By why do they fail?</p> <p>We talked about adaptive vs. technical. It's almost too easy. If you have a technical issue, that is one and done. Easy peesy. But if it is actually parading as an adaptive issue, that's very much harder. Because we now know that technical problems are solved with expertise,</p> <p>If the people who are concerned don't take the work back for themselves, reforms will fail. Adaptive leadership is very much a leadership theory and practice that is about more about the followers than the leaders themselves. It requires the followers to adapt. It is a bit of a misnomer to think that adaptive leader is about the leader doing the adapting. It is more about the followers taking on adaptive challenges and th leader recognizing that fact.</p> <p>When resistance <i>does</i> appear, it should not be thought of as something to be <i>overcome</i>. Instead, it can best be thought of as a useful red flag—a signal that something is going wrong. To use a rough analogy, signs of resistance in a social organization are useful in the same way that pain is useful to the body as a signal that some bodily functions are getting out of adjustment.</p> <p>The resistance, like the pain, does not tell what is wrong but only that something <i>is</i> wrong. And it makes no more sense to try to overcome such resistance than it does to take a pain killer without diagnosing the bodily ailment. Therefore, when resistance appears, it is time to listen carefully to find out what the trouble is. What is needed is not a long harangue on the logics of the new recommendations but a careful exploration of the difficulty.</p> <p>It may happen that the problem is some technical imperfection in the change that can be readily corrected. More than likely, it will turn out that the change is threatening and upsetting some of the established social arrangements for doing work. Whether the trouble is easy or difficult to correct, leaders should at least know what it is dealing with.</p> <p>This leads us to the confusions that exist about leadership.</p>



Leadership is the process of bringing a new and generally unwelcome reality to an individual, organization or setting, and helping them successfully adapt to it.

-Ron Heifetz



Actions	Facilitator
Think	The objective here is get the group thinking with a quote.
Do	Read the quote
Say	If you haven't guessed, I like quotes. Here's another one from Heifetz: Leadership is the process of bringing a new and generally unwelcome reality to an individual, organization or setting, and helping them successfully adapt to it.



What is Adaptive Leadership?

- It is about creating and enhancing **public value**
- It is about mobilizing people to face their problems and their painful decisions so that they learn new ways of being.
- Mobilization implies to motivate, organize, orient and focus attention.



Actions	Facilitator
Think	The objective here is get the group thinking about adaptive leadership
Do	Read the slide
Say	Say what's on the slide



Adaptive Leadership Principles

- > Leadership is an activity, not a particular role or position.
- > Anyone can lead, anytime, anywhere.
- > It starts with you and must engage others.
- > Your purpose must be clear.
- > It's risky.



Actions	Facilitator
Think	The objective here is to further cement the ideas of adaptive leadership with the group
Do	Read the slide
Say	After reading what's on the slide, sum it up with, "These are common truths which form how we view this vague, nebulous concept of 'Leadership.'"



Adaptive Leadership Competencies

- > Diagnose Situation
- > Energize Others
- > Manage Self
- > Intervene Skillfully



Actions	Facilitator
Think	The objective here is to further cement the ideas of adaptive leadership with the group
Do	Read the slide
Say	Common truths which form how we view this vague, nebulous concept of 'Leadership.'



Diagnose the Situation

When diagnosing the situation, you need to deliberately work to more deeply and thoroughly understand a situation before action.

Techniques:

- > Ask: what are the technical and adaptive elements?
- > Focus on process vs. content
- > Test multiple interpretations
- > Faction Mapping
- > Test the heat
- > Identify the locus of work
- > Sometimes you need to “go to the balcony” to view the process where the broader context can be understood.



Actions	Facilitator
Think	The objective here is to further cement the ideas of adaptive leadership with the group
Do	Read the slide
Say	<p>The key to this competency is determining what is going on in the moment, in the current situation, or in the larger organizational context, so we can figure out how to intervene within the system to mobilize others to make progress. Fundamentally, this competency requires us to be able to observe and interpret what is going on within a group, an organization, or a system. Heifetz and Linsky apply the metaphor of getting on the balcony to observe what is happening on the dance floor.</p> <p>Adaptive leadership requires us to move fluidly between being in the midst of the action (the dance floor) and stepping back to observe what is actually happening in the moment as well as to interpret what it means (the balcony). Interpretation can be a contentious and tricky activity. Heifetz and Linsky argue that we tend to interpret events as technical problems rather than recognizing the adaptive elements of these challenges, or to reduce problems to tangible, technical aspects so they can be addressed with technical solutions; we tend to focus on what is happening among individuals rather than viewing what is happening at the system level; and we tend to accept comfortable explanations rather than acknowledging that competing values are embedded in the situation and in potential responses to the situation.</p>



Energize Others

- > When energizing others, the following types of questions may help:
- > What is the orienting purpose around which adaptive work can be accomplished?
- > How can we create a holding environment to engage uncommon voices?
- > What is each individual's responsibility for mobilizing others to make progress on difficult issues? How can we diffuse responsibility for the exercise of leadership beyond those people in positions of authority?
- > How does the dental school's valuing of "comfort" affect its progress (or lack of progress) on adaptive challenges?





Manage Self

When managing self, you need to know yourself enough to understand how well you are situated to intervene. This involves challenging your assumptions about your strengths and weaknesses as well as expanding your repertoire of possible responses.

following types of questions may help:

- > Identify your capabilities, vulnerabilities, and triggers
- > Figure out how others perceive your role in the system
- > Distinguish self from role
- > Choose among competing values
- > Increase tolerance for ambiguity, uncertainty, and conflict
- > Experiment beyond your comfort zone



Actions	Facilitator
Think	The objective here is to get the group to understand how to energize others
Do	Read the slide
Say	<p>What does it take to get others engaged in adaptive work where the outcome is not predetermined? It becomes important to focus the work at a purposeful and meaningful level. We tend to define problems at such a high level of abstraction that no one can disagree; problems defined in this manner will generate little meaningful conflict and people can exist without having to do anything differently. In other words, no one is forced to give up anything they care about.</p> <p>If viewed technically, this problem results in virtually no meaningful engagement. Defining this as a technical problem often results in a collective whining about why we aren't receiving more resources (i.e., providing more resources represents a technical solution to an abstractly defined problem). But if the problem becomes less abstractly defined—for example, looking at reallocation</p>

	<p>of resources, inefficiencies in our current way of operation, different approaches to meeting educational goals—then stakeholders may appreciate that they have something to lose in the adaptive work. Competing values come to the surface, conflict emerges, loss becomes real, and individuals have to change what they are doing and how they are thinking. Clearly, making progress on identified adaptive issues lies at odds with our culture of individualism in dental schools and in higher education in general.</p> <p>Because of resistance to loss, creating an environment in which others begin to engage becomes essential. Heifetz and Linsky refer to this as the “holding environment,” where tough issues can be discussed in a safer, organized way. It takes intentionality to create such an environment, where conversations have a different feel from elsewhere in the dental school. We strengthen the holding environment by pacing the work of the group and enlisting others in making interventions. Creating a holding environment is extremely difficult, which is why external consultants are often used to facilitate these discussions. To exercise leadership, we must communicate an optimistic and shared vision centered on an orienting purpose. Heifetz and Linsky state, “Purpose is an orienting force in the exercise of leadership.”</p>

Actions	Facilitator
Think	The objective here is to get the group to understand how to manage themselves
Do	Read the slide
Say	<p>The key to this competency is how we manage ourselves when played or pressed to do what people <i>want</i> us to do rather than what people <i>need</i> us to do. When in positions of authority, we are faced with a huge range of expectations, and we are under tremendous pressure to satisfy as many of these expectations as possible. Heifetz and Linsky are fond of saying, “Leadership is disappointing your own people at a rate they can absorb.”</p> <p>To accomplish this, we must be cognizant of our true values to ensure that these values align with the leadership work we promote. More important than formal authority, our degree of informal authority (our ability to influence change) will be based largely on what we do rather than what we say. We must consider how our typical ways of problem-solving, what Heifetz and Linsky refer to as “default settings,” inhibit progress on difficult issues. For example, when things get heated, do we work to make the group more comfortable, or do we prefer to stir things up?</p> <p>We need to recognize when our default settings are helpful and when they are not helpful. If these default settings cover a relatively small range of behaviors, can we expand our operational range of behaviors so that we are more effective in a greater variety of situations? Going back to the previous example, if our default setting is to make a situation more comfortable, can we get ourselves to “turn up the heat” when that is what would be required for progress to be made?</p> <p>Another critical aspect of managing self is to separate the role we play in an organization or system from our true selves. Most of us have experienced being attacked because of our stance on an issue, so this can serve as a live example of the need to separate role from self. If we take the attack personally, then we, in effect, displace the focus from the adaptive issue and, instead, we become the issue. By making the issue personal (about our self), we remove ourselves from the role of effectively exercising leadership. Keeping a steadfast focus on the issue at hand and not “avoiding the work” are primary acts of exercising leadership. Avoiding the work in the context of leadership includes avoiding uncomfortable discussions of conflicting values and priorities among individuals and groups with a vested interest in the direction of the decision or a proposed policy that may alter the “way things are done.”</p> <ul style="list-style-type: none"> • When occupying positions of senior authority, what pressures you to do the leadership work yourself, instead of giving the work back to the people affected by the problems? • What are your default settings (what behaviors do you gravitate toward)? In what situations do these defaults help you? In what situations do they hinder your exercise of leadership? • What role have you taken on, and to what effect? Note that, in the context of this question, “role” does not refer to your job or position. • What is your level of informal authority? How can you gain or lose informal authority?

	<ul style="list-style-type: none">• What story are you telling yourself? Does it reinforce your default way of thinking? How can you facilitate letting in data and interpretations outside of your default range? Are you more interested in making progress on adaptive challenges or maintaining your default settings?• How much of your passion do you bring to your leadership work? How much of yourself are you willing to put into this work? <p>others in making interventions. Creating a holding environment is extremely difficult, which is why external consultants are often used to facilitate these discussions. To exercise leadership, we must communicate an optimistic and shared vision centered on an orienting purpose. Heifetz and Linsky state, “Purpose is an orienting force in the exercise of leadership.”⁹</p>
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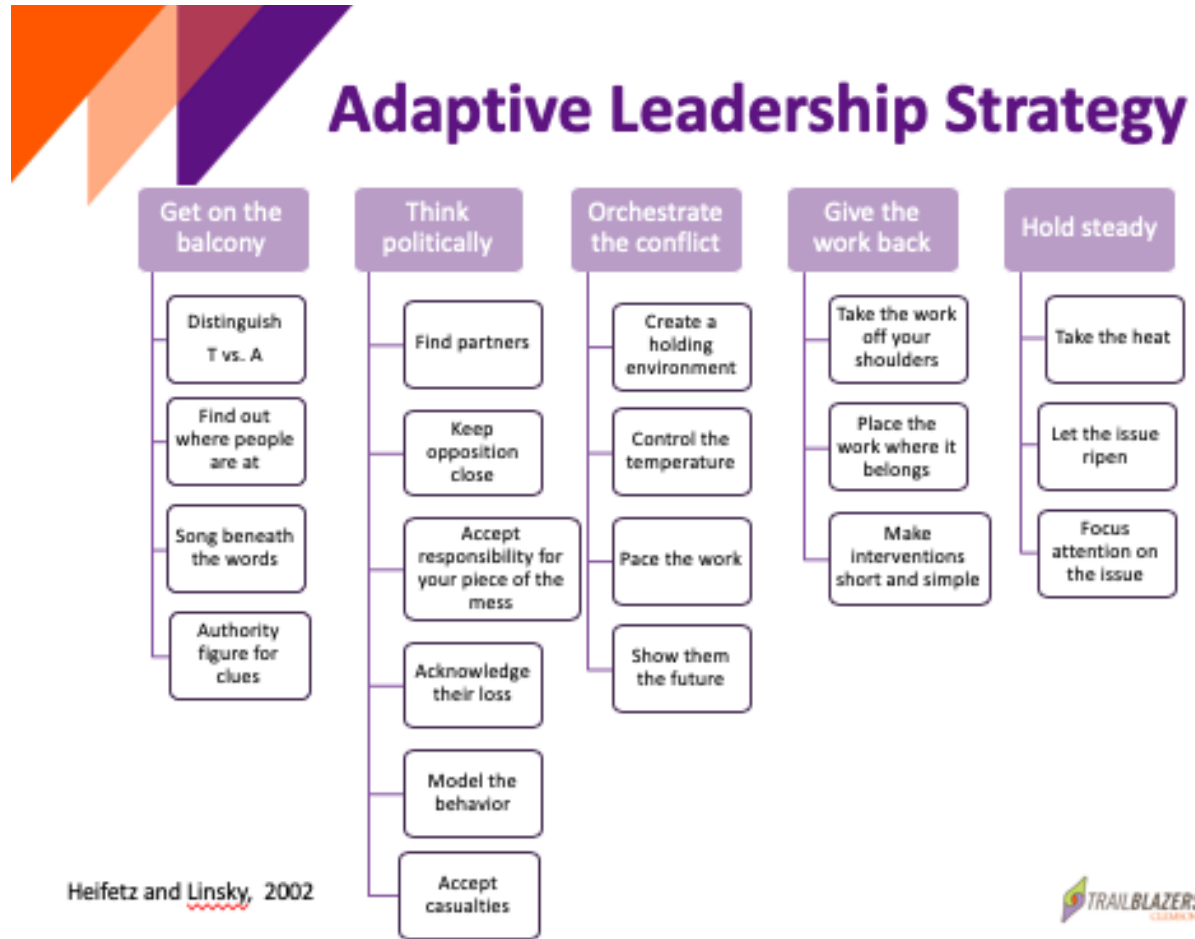
Intervene Skillfully

When facilitating interventions, you need to make conscious choices about whether, when, and how you intervene and how to do so most skillfully to maximize your chances for making progress.

- > Make conscious choices
- > Raise the heat
- > Give the work back
- > Hold relentlessly to purpose
- > Speak from the heart
- > Act experimentally



Actions	Facilitator
Think	The objective here is to get the group to understand how to facilitate interventions
Do	Read the slide
Say	<p>How effectively can we take action within the group, organization, or system to mobilize others to make progress on difficult issues? At its core, leadership is an activity—an intervention into the system intended to move an issue or adaptive challenge forward. An intervention can be a planned, constructed proposal or an in-the-moment improvisation.</p> <p>Regardless of its style, an effective intervention has several attributes. First, it is critical to gain attention for the adaptive issue at hand; typically, this is accomplished through the degree of informal authority we hold. For an intervention to “take,” we must be influential within the group, organization, or system. Our degree of informal authority has little to do with our formal positional authority. Another attribute of an effective intervention is identifying the adaptive work to be done. The most common “leadership error” is in not distinguishing technical from adaptive work.²</p> <p>Thus, making this distinction becomes an important criterion of an effective intervention. Because adaptive challenges invariably involve competing values, which most often go unacknowledged, an effective intervention will identify potential losses to stakeholders and, in fact, orchestrate meaningful conflict across factions. Conflict, of course, raises the degree of disequilibrium (“raising the heat”); an effective intervention discerns the appropriate degree of disequilibrium, either raising or lowering the heat, necessary to make progress. Finally, an effective intervention places the responsibility for the work with the people who have the stake in the problem.</p>



Actions	Facilitator
Think	The objective here is to teach the group how to navigate solving an adaptive leadership problem.
Do	Read the slide
Say	<p>So how do we enact adaptive leadership to address the messy problems we face in our programs, in our departments, in our lives? Nuts and bolts.</p> <ul style="list-style-type: none"> • Get on the balcony: identify the adaptive challenge • Distinguish Technical from Adaptive Work • Find Out Where People Are At • Listen to the Song Beneath the Words • Read the Authority Figure for Clues • Think politically • Find Partners • Keep the Opposition Close • Accept Responsibility for Your Piece of the Mess • Acknowledge their Loss • Model the Behavior • Accept Casualties <ul style="list-style-type: none"> • Orchestrate the conflict • Create a Holding Environment • Control the Temperature • Pace the Work • Show Them the Future • Give the work back • Take the Work Off Your Shoulders • Place the Work Where it Belongs • Make Your Interventions Short & Simple • Hold Steady • Take the Heat • Let the Issues Ripen • Focus Attention on the Issues <p>Think about what you would do for each of these adaptive tasks you are faced with. Jot down notes to address these problems using adaptive approaches.</p>

Actions	Facilitator
Think	The objective here is to introduce the guest speaker
Do	Make sure their presentation and anything else they need is ready to go. Also, make sure a short bio is prepared to introduce the speaker
Say	Introduction of speaker



Leadership for today’s world requires enlarging one’s capacity to see the whole board, as in a chess match—to see the complex, often volatile interdependence among the multiple systems that constitute the new commons.

-Sharon Daloz Parks



Actions	Facilitator
Think	The objective here is to start wrapping up the talk on adaptive leadership with a quote
Do	Read the quote
Say	Sharon Daloz Parks says: Leadership for today’s world requires enlarging one’s capacity to see the whole board, as in a chess match—to see the complex, often volatile interdependence among the multiple systems that constitute the new commons.



Your Charge

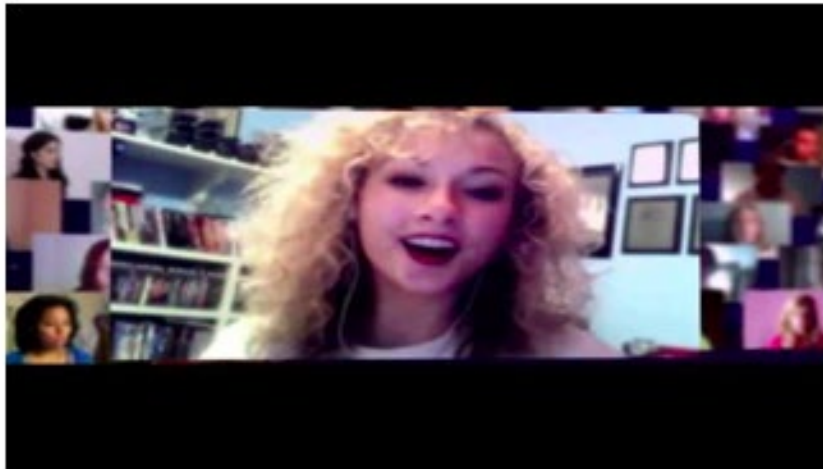
- You’ve received examples, solutions, and techniques
- You can recognize and classify challenges and solutions as technical and/or adaptive
- What are some ways you can think differently to solve these problems?
- How will you continue to apply adaptive leadership elements to your specific challenge relative to a situation in your purview?



Actions	Facilitator
Think	The objective here is to summarize what the group has discussed in this session
Do	Read the quote
Say	<p>Now I would like to tell you where you are going and how you’ll get there. Then I want to remind you where you went and how you got there!</p> <ul style="list-style-type: none"> • You’ve received examples, solutions, and techniques for being an adaptive leader. • You can now recognize and classify challenges and solutions as either technical or adaptive or both. • You’ve been warned that being an adaptive leader is uncomfortable work. Its uncomfortable work, because we simply don’t know what is going to happen. We often become confused as leaders and are told that is bad. Being confused is a catalyst for unleashing our latent creative potential. This may seem confronting to those who like certainty and predictability. But unless we are willing to be confused and enter the space where there is no guarantees, we effectively close ourselves off from the possibility of change. <p>My charge to you is this:</p> <ul style="list-style-type: none"> • How willing are you to be confused? How can you be an adaptive leader? • What are some ways you can think differently to solve these problems? • How will you continue to apply adaptive leadership elements to your specific challenge?



Leadership Generates Leadership



[https://www.ted.com/talks/eric whitacre a virtual choir 2 000 voices strong?language=en](https://www.ted.com/talks/eric_whitacre_a_virtual_choir_2_000_voices_strong?language=en)



Actions	Facilitator
Think	The objective here is to summarize wrap up
Do	Make sure the Ted Talk video is set up prior to the session
Say	<p>To conclude, we want you to remember that all of you are leaders. We want you to remember that the act of leadership <i>is</i> leadership. We want you to remember that leadership is an activity.</p> <p>When you begin to lean into being confused, when you understand that leadership takes looking at the world with new lenses, and when you can identify the issues you face as needing adaptive verses technical solutions, engaging multiple stakeholders, and needing new thinking. That’s when these adaptive moments change the way we look at the world—and it changes what we believe is possible, and we begin to make traction on the big issues that confront us. We hope you will continue to practice being adaptive leaders. Like Maya Angelou says: “I did then what I knew how to do. Now that I know better, I do better”.</p> <p>To close, I am going to play a little of this Eric Whitacre led digital choir. I encourage you to look at his Ted Talk to find out more about his use of adaptive leadership to form this choir of 185 voices from 12 countries that spanned the globe.</p>



Mentoring, Mutuality & GROW Model

Cynthia Sims & Karen High



Actions	Facilitator
Think	The objective here is to introduce the GROW model and how it relates to mentoring
Do	Prepare a brief role play of what the GROW model looks like in action.
Say	<p>So, one of the things we just want to say, so talk about your successes, do not be shy, share. As well as your challenges, share. The quality of your relationship is only going to be as good as your candor, so if you're not comfortable with that person, then it's going to be really more of a transactional relationship, and that's not going to get you probably where you want to go. Acknowledge an accomplished goal, acknowledged incomplete goals, and reflect on the mentoring experience.</p> <p>So, reflection is important. So this is what we told them in terms of how to help the protégé, so during the mentoring session, we're sharing with them. They're not there solve problems but they're there to help you solve problems. And so with that, we want to use this model, grow. So grow stands, goal, reality, options and will. So one is being prepared, coming with an issue that you'd like to discuss, what is it that you want to have happen?</p> <p>Where are you now? What could you do? And then what will you do? So that's the model that we have given to them and we are going to do a role play for you.</p> <p>From here, act out your role play.</p>



Wrap up/ Next Steps

All



Actions	Facilitator
Think	The objective here is to look at what the participants have learned today and what the next steps will look like
Do	Have the next session planned out and a brief recap of this session
Say	Give a brief recap of what was talked about



Program Activities

When	What	Where
Friday, Nov 15, 11:30-4:30	DISC Behavioral Styles <ul style="list-style-type: none"> • Peer Mentoring • Implicit Bias • Leadership Project 	Hendrix
Friday, December 13, 11:30-4:30	Leadership Styles <ul style="list-style-type: none"> • Debrief 360 Leadership Report • TBD 	Hendrix

Actions	Facilitator
Think	The objective here is to look at what's next
Do	Have a brief summary of future sessions
Say	Talk about what's on the agenda for future sessions



Program Activities

Mentor Matching

- Fill out profile in Google Doc
- Select top 4 mentors using Qualtrics Survey

Surveys

- Leadership styles - 360°
- DISC Behavioral Profiles

Resources

- CANVAS

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Actions	Facilitator
Think	The objective here is to look at what the participants need to get done for the next session
Do	Figure out what the participants need to do for the next session and all make sure that all links/surveys/etc are live and ready to go
Say	Talk about what they need to do next.



Actions	Facilitator
Think	The objective here is to ask if there's any questions
Do	Ask if there's any questions
Say	Answer any questions