Adaptive Leadership for Change Management

Delta Center Convening
Marc Ross Manashil

February 12, 2019
Today’s Agenda

1. Authority & Leadership Review
2. Technical & Adaptive Challenges
3. Diagnosing the System
4. Taking Action: Productive Disequilibrium
5. Running Experiments
6. Next Steps & Wrap-up
Authority & Leadership
# Authority & Leadership

**NOTE:** One not need be in a position of authority to exercise leadership

<table>
<thead>
<tr>
<th>Authority</th>
<th>Leadership</th>
</tr>
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<tbody>
<tr>
<td>• Role, position or power</td>
<td>• Activity</td>
</tr>
<tr>
<td>• Direction</td>
<td>• Something you do rather than your position</td>
</tr>
<tr>
<td>• Protection</td>
<td>• Anyone can take up leadership</td>
</tr>
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<td>• Order</td>
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# Authority & Leadership

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<td>• Preserving what works</td>
<td>• Discarding what doesn’t work</td>
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<tr>
<td>• Maintaining the status quo</td>
<td>• Changing the status quo (not always good!)</td>
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<tr>
<td>(not always bad!)</td>
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<td>• Following a known path</td>
<td>• Going beyond our authorization to help discover a new path</td>
</tr>
<tr>
<td>• Setting &amp; meeting expectations</td>
<td>• Dangerous, requires purpose</td>
</tr>
<tr>
<td>• Can be given &amp; taken away</td>
<td>• Never given, always taken</td>
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Imperative of Adaptation

• Preserving what works
• Discarding what doesn’t
• Learning new practices
• Accompanying people through loss (at a rate they can absorb)
Activity

Complete Worksheet #1: The Authorizing Environment (5 MINTUES):

Part 1: Maintaining/Growing Authority

◦ What expectations do my authorizers have of me?
◦ What must I do to maintain their authorization?
◦ What pressures am I under?

Part 2: Exercising Leadership

◦ How can I exercise leadership on something I really care about?
◦ What are the risks of doing so?

Pair and share your work (10 MINUTES/ 5 MIN EACH)
Technical & Adaptive Challenges
Technical vs. Adaptive Challenges

**Technical**
- Go well with authority
- Tried, tested and true
- Known solution leads to an expected result
- Answers found by applying existing knowledge and expertise
- Can be complex

**Adaptive**
- Require changes in values, attitudes and behaviors
- Take time; no quick easy fixes from authority
- Conflicts in values between stakeholders
- Root issues/elephants in the room
- Loss and resistance in the face of necessary change
- Technical solutions won’t work
Worksheet 2: Describe an important challenge that you are facing in your work as you work toward value-based payment and care. (Avoid personality issues!)

- Describe the larger challenge (left column)
- What are the technical aspects of dealing with the challenge? (center column)
- What are the adaptive aspects that must be addressed over the long-term? (right column)
## Technical vs. Adaptive Challenges

Describe an internal challenge at your organization or practice.
(Avoid personality issues!)

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Stakeholder Analysis
Case Study

Ann Rodriguez
Assistant Director
i2i Center for Integrative Health
### Technical & Adaptive Challenges: Example from North Carolina (i2i)

Describe an internal challenge at your organization or practice.
(Avoid personality issues!)

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<td><strong>What adaptive aspects that must be addressed over the long-term?</strong>&lt;br&gt;• Talk to providers to get a better sense of their concerns and questions&lt;br&gt;• Vet and get feedback on initial set of metrics&lt;br&gt;• Convene LME/MCOs and a few provider organizations who have dabbled in this space to discuss possible first steps, lessons learned, etc.</td>
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How to [achieve the desired change against the backdrop of [the countervailing forces that are keeping the needed change from happening].
Framing Your Adaptive Challenge

How to [increase commitment of providers to VBC/P]

against the backdrop of

[widespread feelings of overwhelm due to the unknowns of change and managing competing fires].
Framing Your Adaptive Challenge

How to

[achieve the desired change]
against the backdrop of
[the countervailing forces that are keeping the needed change from happening].

• Pointers:
  • Use this format!
  • Avoid a technical framing of the challenge (i.e., solution)
  • Avoid personalizing. Stick to the challenge
  • What is the larger change being sought? (Pt. 1)
  • What organizational force stands in the way? (Pt. 2)
  • What is happening culturally that prevents the change?
Diagnosing the System

Key Stakeholders
• Who are the key stakeholders (including yourself)?

Values
• "Name" the values (e.g., efficiency, quality, thoroughness)

Loyalties
• Are loyalties constraining anyone from taking action?

Losses
• What losses will occur if the change you seek happens?
Activity

Think about your Adaptive Challenge

1. Individually, complete Worksheet #3: Stakeholder Analysis, Part 1 ONLY (10 MINTUES):
   - Identify each stakeholder
   - Hypothesize values, loyalties and losses for each
   - Answer the “Questions for Analysis”

2. Discuss with team and construct a collective stakeholder map (20 MINTUES)
Productive Disequilibrium
Productive Disequilibrium

Turn the Heat Up or Down?

Turn it Up
- Orchestrating the disequilibrium
- Give back the work
- Protect voices on the periphery

Turn it Down
- Pace the work
- Ripen the issues
- Re-claim authority
- Address technical
- Use humor
Forms of Resistance

Work Avoidance
Activity

Review your identified stakeholders

AND think about your system:

Individually, complete
Worksheet #3 Part 2

1. Identify the overall disequilibrium as it relates to the adaptive challenge (make a mark on the Disequilibrium Chart)

1. Put a dot on the disequilibrium chart, compare and discuss with your team
Next Step: Intervention
Plan an Intervention

**PLAN**
- What will you do? (Think Small!)
- What are you trying to learn or achieve?
- Are you trying to turn the heat up or down?
- What are your assumptions about what will happen?

**DO**
- Carry out the intervention

**STUDY**
- Were your assumptions correct?
- What did you learn? (What worked/what didn't?)

**ACT**
- What's next based on what you learned?
Activity

• **Individually**, think of one intervention you’d like to make upon returning home, completing Worksheet #4 questions 1 - 4 (10 MINTUES)

• Meet with your team to discuss individual intervention options and exchange feedback (25 MINTUES)

• Run the intervention and complete questions 5 - 8

• Meet with your team to discuss results and next steps
Intervention Ideas

• Meet for coffee or lunch with a key staff person
• Brainstorm ideas with your supervisor
• Organize a brown bag lunch discussion
• Raise a concern or ask a questions at a meeting
• Suggest a evaluation or survey
What Questions Do You Have?
Thank you for participating!

For questions, please email: marc@elevenplusyou.com