













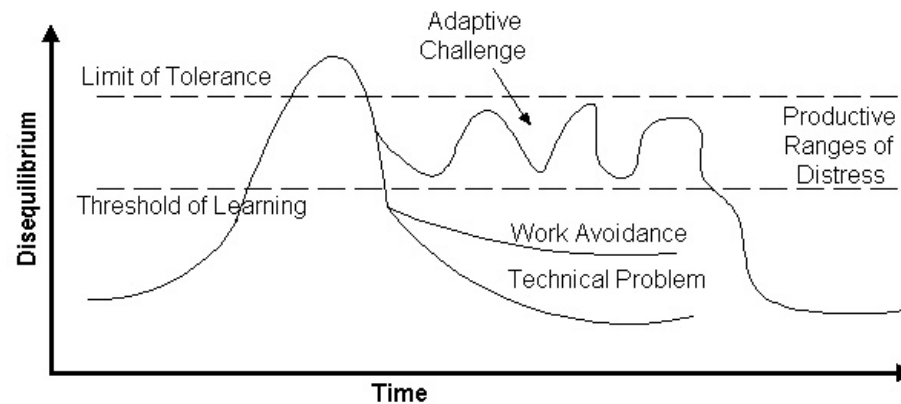


**PART 1b: Questions for Analysis** - Review your Stakeholder Analysis and answer the following questions:

- Which stakeholder values seem to be in alignment?
- Which stakeholders have conflicting values?
- Are loyalties constraining anyone from taking action?

**PART 2: CREATING PRODUCTIVE DISEQUILIBRIUM:**

- What is the overall level of disequilibrium in your organization as it relates to the adaptive challenge? **MARK THE CHART!**
- Do you need to turn up the heat OR turn it down?



Source: Ronald A. Heifetz and Donald C. Laurie, "Mobilizing Adaptive Work: Beyond Visionary Leadership," in Jay A. Conger, Gretchen M. Spreitzer, and Edward E. Lawler III, eds., *The Leader's Change Handbook: an Essential Guide to Setting Direction and Taking Action* (New York: John Wiley & Sons, 1998)



# List of Values by Category

Use the following list of values to assist you in selecting single words that identify values for your named staked holders.

<b>Integrity</b>	<b>Achievement</b>	<b>Intelligence</b>
Accountability	Accomplishment	Brilliance
Candor	Capable	Clever
Commitment	Challenge	Common sense
Dependability	Challenge	Decisiveness
Dignity	Competence	Foresight
Honesty	Credibility	Genius
Honor	Determination	Insightful
Responsibility	Development	Knowledge
Sincerity	Drive	Learning
Transparency	Effectiveness	Logic
Trust	Empower	Openness
Trustworthy	Endurance	Realistic
Truth	Excellence	Reason
	Famous	Reflective
<b>Feelings</b>	Greatness	Smart
Acceptance	Growth	Thoughtful
Comfort	Hard work	Understanding
Compassion	Improvement	Vision
Contentment	Influence	Wisdom
Empathy	Intensity	
Grace	Leadership	

Gratitude	<b>Achievement (cont)</b>	<b>Strength</b>
Happiness	Mastery	Ambition
Hope	Motivation	Assertiveness
Inspiring	Performance	Boldness
Irreverent	Persistence	Confidence
Joy	Potential	Dedication
Kindness	Power	Discipline
Love	Productivity	Ferocious
Optimism	Professionalism	Fortitude
Passion	Prosperity	Persistence
Peace	Recognition	Power
Poise	Results-oriented	Restraint
Respect	Risk	Rigor
Reverence	Significance	Self-reliance
Satisfaction	Skill	Temperance
Serenity	Skillfulness	Toughness
Thankful	Status	Vigor
Tranquility	Success	Will
Welcoming	Talent	
<b>Spirituality</b>	Victory	<b>Freedom</b>
Adaptability	Wealth	Independence
Altruism	Winning	Individuality
Balance		Liberty
Charity	<b>Creativity</b>	
Communication	Creation	<b>Courage</b>
Community	Curiosity	Bravery
Connection	Discovery	Conviction
Consciousness	Exploration	Fearless
Contribution	Expressive	Valor
Cooperation	Imagination	
Courtesy	Innovation	<b>Order</b>
Devotion	Inquisitive	Accuracy
Equality	Intuitive	Careful
Ethical	Openness	Certainty
	Originality	Cleanliness

<b>Spirituality (cont)</b>	<b>Creativity (cont)</b>	<b>Order (cont)</b>
Fairness	Uniqueness	Consistency
Family	Wonder	Control
Fidelity		Decisive
Friendship	<b>Enjoyment</b>	Economy
Generosity	Amusement	Justice
Giving	Enthusiasm	Lawful
Goodness	Experience	Moderation
Harmony	Fun	Organization
Humility	Playfulness	Security
Loyalty	Recreation	Stability
Maturity	Spontaneous	Structure
Meaning	Surprise	Thorough
Selfless		Timeliness
Sensitivity	<b>Presence</b>	
Service	Alertness	<b>Health</b>
Sharing	Attentive	Energy
Spirit	Awareness	Vitality
Stewardship	Beauty	
Support	Calm	
Sustainability	Clear	
Teamwork	Concentration	
Tolerance	Focus	
Unity	Silence	
	Simplicity	
	Solitude	

**Core Values List: Over 200 Personal Values. (2018, May 11). Retrieved from <https://scottjeffrey.com/core-values-list/>**



**WORKSHEET #3**  
**PLANNING AN INTERVENTION/PDSA EXAMPLE**



Today's Date: \_\_\_\_\_ 05/22/2018 \_\_\_\_\_

Name of Idea to Test: Engaging ABC Clinic in a lunch-time meeting to identify one PDSA to implement in the next two weeks to improve Diabetes Management Measure for annual HbA1c testing.

**PLAN – Answers who, what, when where**

1. What will you do? I plan to (steps to execute – who, what, when, where):

For high-priority practice, ABC Clinic, extend my next planned visit (6/4/2018) from 60-minute to 90-minute long meeting to identify a small test of change that can be conducted in the next two weeks to impact diabetes measure for annual HbA1c testing, and to learn the PDSA process.

- A. Arrange logistics (confirm date, space, lunch, handouts, etc.)
- B. On 6/4 – ask staff to brainstorm for 2 minutes, using sticky notes, with answers to the following question: “What is preventing us from meeting the Diabetes measure for annual testing of HbA1c?” Instruct them to write as many ideas as they can think of, one idea per post-it
- C. When two minutes have expired, ask one individual to share their ideas and place them on the chart pad. Then ask, “Did anyone have similar ideas to the ones just shared?” Group the “like” ideas together. Add any new ideas from the remaining team members.
- D. Then ask the team to look at the ideas on the chart pad and ask them each to vote for their top 2 ideas/areas to focus on for change
- E. Next, identify which ideas received the most votes and ask team to agree on one area of focus.
- F. Convert this idea into a SMALL test of change and walk through PDSA worksheet for them to conduct the PDSA within 2 weeks BY 6/16/2018

2. What are you trying to learn or achieve? I hope to learn/achieve:

To engage staff/providers in the work of generating new ideas/possibilities for impacting diabetes measures and to learn from these ideas as a way to build performance improvement capacity.

The staff / providers will be empowered by a quick win.

3. Are you trying to turn the heat up or down? I need to: Turn up the heat!

**WORKSHEET #3**  
**PLANNING AN INTERVENTION/PDSA EXAMPLE**

4. What are your assumptions about what will happen? I predict that:

- They will struggle with keeping the test “small”
- They will feel they have time to conduct the test and collect data
- They will feel that this is too big a challenge to tackle.
- They will discover how easy it is to learn from a small test and quick wins

**DO – Carry Out the Plan/Report what happened (data); begin analysis**

5. Here’s what happened:

**STUDY – Complete analysis of data; compare the data to your predictions and summarize**

6. Were your assumptions correct?

7. What did you observe/learn? What worked? What didn’t work?

**ACT – What are you going to try next?**

8. What’s next based on what you learned?

**WORKSHEET #3  
PLANNING AN INTERVENTION/PDSA**



Today's Date: \_\_\_\_\_

Name of Idea to Test: \_\_\_\_\_

**PLAN – Answers who, what, when where**

1. What will you do? I plan to (steps to execute – who, what, when, where):

2. What are you trying to learn or achieve? I hope to learn/achieve:

3. Are you trying to turn the heat up or down? I need to:

4. What are your assumptions about what will happen? I predict that:

**WORKSHEET #3**  
**PLANNING AN INTERVENTION/PDSA**

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## ADAPTIVE LEADERSHIP KEY POINTS



### ADAPTIVE LEADERSHIP IS ABOUT . . .

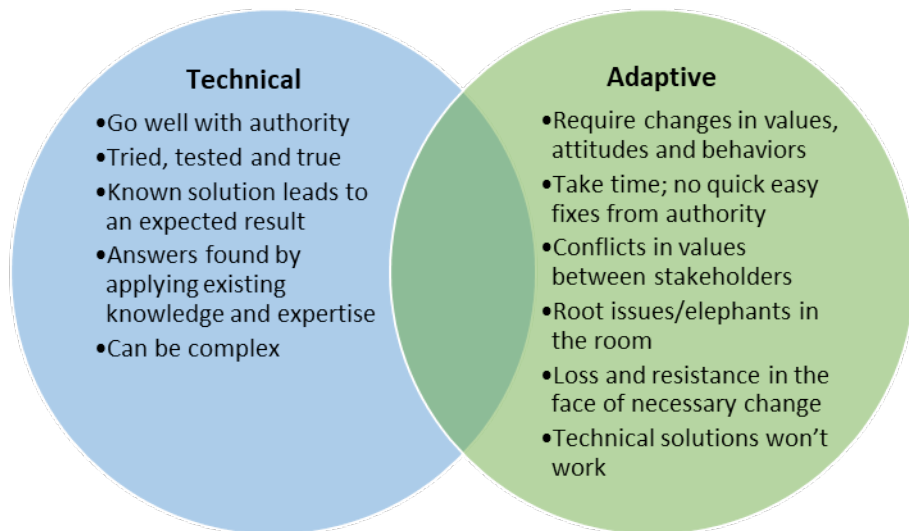
- **Helping** organizations to **confront challenges** that they have been unable/unwilling to face or address
- **Recognizing** that we operate in a larger **system of people** who each bring a unique viewpoint based on their experiences, values, family, culture and beliefs
- **Using a set of tools** to better understand the system and how we can **catalyze change** within it, without getting sidelined
- Abandoning ways of working that once served an important purpose but are now a liability

### Authority vs. Leadership

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

Authority	Leadership
• Role, position or power	• Activity
• Direction	• Something you do rather than your position
• Protection	• Anyone can take up leadership
• Order	
• Preserving what works	• Discarding what doesn't work
• Maintaining the status quo (not always bad!)	• Challenging the status quo (not always good!)
• Following a known path	• Pushing boundaries of our authority
• Setting & meeting expectations	• Dangerous, requires purpose
• Can be given & taken away	• Never given, always taken

### Technical vs. Adaptive Challenges



### Framing the Adaptive Challenge

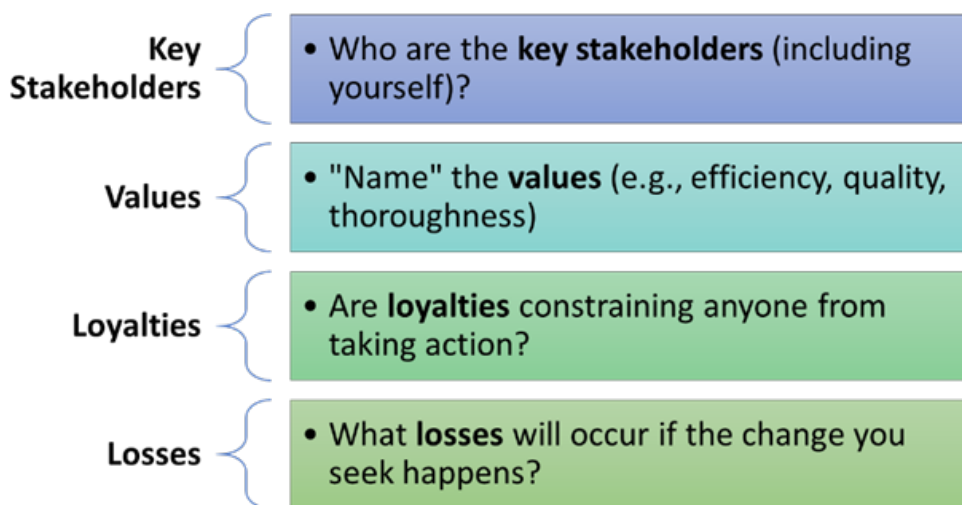
How to  
*[achieve the desired change]*  
 against the backdrop of  
*[the countervailing force that is keeping the needed change from happening].*

#### Pointers:

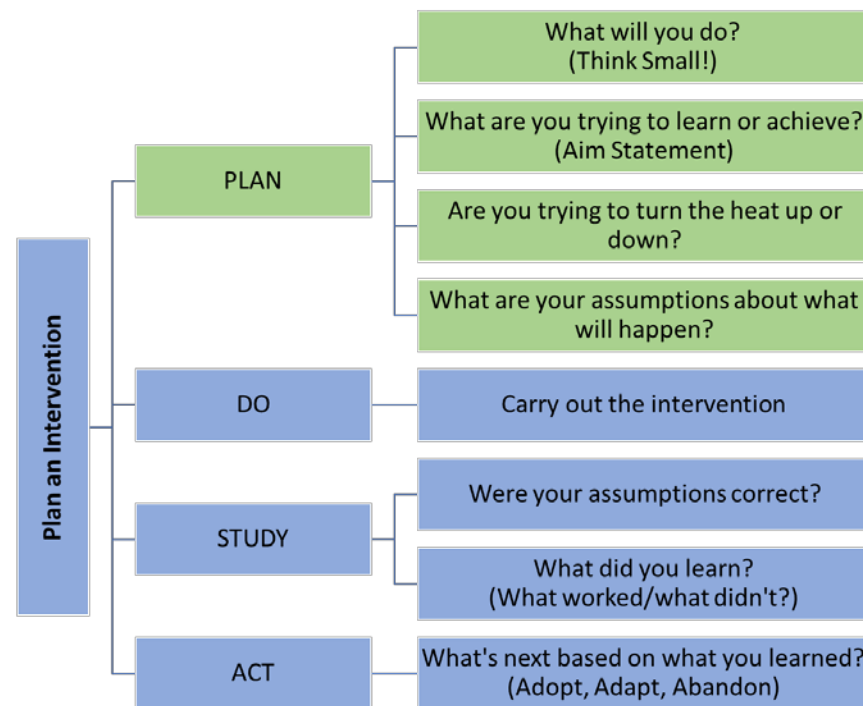
- Use **this format!**
- Avoid a **technical framing** of the challenge (i.e., solution)
- **Avoid personalizing.** Stick to the challenge
- What is the **larger change** being sought? (Pt. 1)
- What **organizational force** stands in the way? (Pt. 2)
- What is **happening culturally** that prevents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

## ADAPTIVE LEADERSHIP KEY POINTS

### STAKEHOLDER ANALYSIS



### INTERVENTION/PDSA



#### **References:**

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