

Practicing Change Series

**Tod
Bolsinger**

Foreword by Marty Linsky

**Invest in
Transformation**

**Quit
Relying
on Trust**

Illustrated by
Mark Demel



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FOREWORD BY MARTY LINSKY

I am writing this flying home to New York after four days in Los Angeles with my fifty-two-year-old son, Sam, and his wife, son, and mother-in-law.

The weekend ended with a long unplanned, intimate conversation between Sam and me in front of a fireplace in the lobby of my hotel. Without naming it, we talked about what we both needed to do in this last chapter of my life to enrich our already deep relationship and make the best use of whatever time we have left together.

I experienced it as a hard, complicated, important, and generative conversation, requiring us each to voice and then try to let go of perspectives and assumptions—“truths” that we were inured to and had worked for us. We agreed to individually abandon some habituated ways of thinking and being, and to experiment with some new behaviors.

Then I read Tod Bolsinger’s *How Not to Waste a Crisis*.

Sam and I were modeling the very process Tod describes.

Tod brings a spiritual anchor and a lifetime of addressing concrete problems to the connective work of applying the tools and frameworks of adaptive leadership to the vagaries

of everyday personal and professional life, especially relevant in times characterized by constant, rapid change.

No matter who you are, where you are, how you spend your days, or how old you are, Tod Bolsinger's practical guidance and probing reflective ques-

tions are a vehicle for you and your organization, family, or community to get off the dance floor, get on the balcony, bring a new perspective to the challenges and opportunities in front of you, and begin to make more progress than you have in the past in closing the gap between your most noble aspirations and your current reality.

He has given us a gift. I am already a beneficiary.



ABOUT THE PRACTICING CHANGE SERIES

The **Practicing Change** books are about learning skills for leading in a time of deep disruption and change. Together, through them all, we will learn to recognize and then reset our leadership skills for a world that is constantly being upset and reset.

First, we will learn to see the out-of-date habits that have been cultivated through our successes. Then, we will work on new skills necessary for leading in times of change. Those new skills will enable us to embody a different form of leadership—what is called “adaptive leadership.”

Adaptive leadership, as developed by Ronald Heifetz and Marty Linsky, is an approach to organizational problems that is needed when your old best practices no longer work. Adaptive leadership starts with diagnosis: Is this problem something that our expertise can solve or not? Is this something that requires us to apply a solution that already exists, or does it fall outside of our current knowledge and ability? Will it require learning and making really hard no-win choices?¹ As we shall repeatedly see, developing adaptive capacity—

that is, the capacity to apply and adapt an organization's most sacred core values so that its mission will thrive in this new environment—is the greatest challenge of leadership.²

Most communities are hardwired to resist this kind of adaptation. They believe that survival means reinforcing the way we have always done things in the past. The result is that instead of undergoing transformation in order to be more effective in their mission to serve the world, organizations unconsciously reinforce the very status quo that is not working.

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Schools want to attract students to maintain the faculty who have come to do research within the safety of tenure and the resources of an academic community. A nonprofit's work that was once an innovative solution to a real problem becomes, after a time, an institution whose own survival is now the core purpose for being. In order to restore their flagging attendance or lagging donations, churches double down on the programs that people have historically loved most and will fill the facilities that they invested in building. And established businesses get disrupted by upstart

startups while they are busy picking out new furniture for a bigger corporate office.

When a changing world or changing needs require an organization, institution, or company to itself change in order to keep being relevant to the challenges that are arising around them, it becomes clear that the internal organizational transformation needed—and the losses that must be faced—is an even more difficult leadership challenge than the external reason for changing.

This requires learning a new set of leadership practices.

In these four books (*How Not to Waste a Crisis*, *The Mission Always Wins*, *Leading Through Resistance*, and *Invest in Transformation*) we are going to reexamine four “mindsets” that have resulted in bad habits for most leaders. We’ll take on one of them through each book:

1. Trying harder at what has been successful in the past
2. Focusing on pleasing our historical stakeholders
3. Doing whatever we can to eliminate resistance
4. Confusing trust with transformation

These mindsets are so ingrained within most leaders that they are usually never questioned. Shouldn’t we work hard, take care of our most loyal members, manage resistance to change, and be trustworthy?

Yes. But also no. Not primarily.

Your primary work as a leader is to develop your own capacity to lead your people through the transformation necessary to face the challenges of a changing world.

And that takes practice. Lots of practice. Hours of deliberate practice.

Feel free to read these books in any order, starting with the “old mindset” that is most familiar or potentially most challenging for you. In each book, we will start with a problem area, and then instead of trying to learn a new intellectual concept, we’ll focus instead on a new *skill*—trusting that that new skill will help us both see and think differently.³ If we can keep practicing the new skill (and reinforcing the new insight), eventually we’ll develop new habits that will become second nature.

Your primary work as a leader is to develop your own capacity to lead your people through the transformation necessary to face the challenges of a changing world.

The pattern that we will use in these books will be the same. We will start with a case study adapted from real-life leadership challenges.⁴ After the case study (and throughout the book) we will pause and engage in some

reflective exercises that are very similar to the kinds of coaching conversations that my team and I have with leaders all over the world.

These are called “balcony sessions.”⁵

While the “dance floor” is where the action is, the “balcony” is where leaders try to get some larger perspective amid the swirl of the challenges in front of them, decisions foisted on them, opinions and desires of everyone around them, and even their own conflicting internal feelings.⁶ Good leaders learn how to toggle back and forth between “listening on the

The way we learn is via a consistent

STRUCTURE in these books...



dance floor” and “looking from the balcony” and begin to see a different way of approaching a new challenge.

After the first balcony session, we will proceed through a reflective-practice learning process:

1. Disrupting an old mindset (which leads to)
2. Practicing a new skillset (which leads to)
3. Embodying an adaptive reset (a new habit for adaptive leadership)

The Practicing Change books—and the process that they teach us—are the ultimate survival guide for leaders in chaos. Together we unlearn bad habits, master adaptive skills, and embrace a leadership style that offers genuine change and transformation—to our people and ourselves.

INTRODUCTION TRUST & TRANSFORMATION

There is no transformation without trust. Period. End of sentence.

That axiom is as bedrock and foundational to leading as it can be.

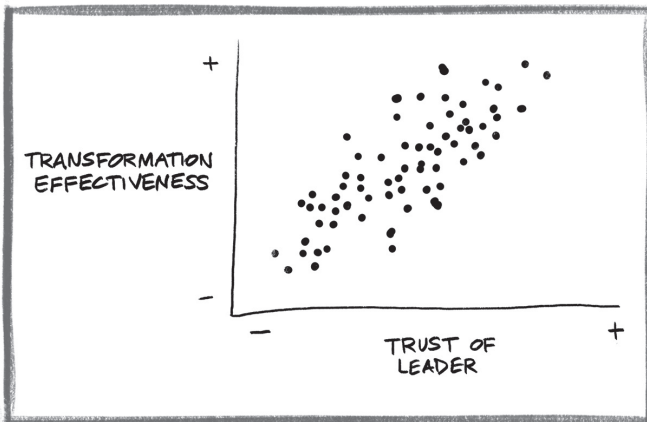
If you are a leader reading this book, I encourage you to pause here and internalize this truth before you read anything else. If nothing else, taking this truth seriously is critical because of the number of scandals of untrustworthy leaders and what it has done in our culture—even in the church.

If you are reading this book because you have been entrusted with the calling to bring about good, healthy, missional change, you should pause even a bit longer and be as honest as possible with yourself about what kind of trust it is going to take to accomplish your leadership vision:

- The need for you to be diligent about your character
- The obligation for you to be consistent in your integrity
- The candor, courage, and empathy to walk with a group through the disruption of change

→ The absolute necessity for you to be honest about your shortcomings (because they will be exposed!)

Leaders don't have to be perfect, but they do have to be trustworthy. When trust ebbs, leading people to accomplish any mission is almost impossible. If leaders are not trusted, no one will follow them anywhere.



Even more, if a leadership challenge was thrust on you because of an external disruption—a rapidly changing world, a crisis, or a radical change in the environment or context of your mission—then the anxiety caused by the unknown requires that trust to be even greater, because the unknown and unfamiliar requires deep personal *transformation*. Transformation is the crux of all leadership challenges.

When trust is gone,
the transformational journey is over.

LEADERSHIP AND TRANSFORMATION

Leadership, as I define it, is *energizing a community of people toward their own transformation so that they can accomplish a shared mission*.¹ And that transformation cannot begin until the level of trust is high enough for the group to even consider what it will cost to be transformed.

Adaptive change requires leaders to face the challenges of a changing world or disrupted environment with hard decisions around core values, with hard questions about what we need to learn (and unlearn!), and with hard truths about the necessity of our own transformation. Adaptive change requires leaders to become what they are not yet already.

Transformation is what makes adaptive leadership *adaptive*.

Transformation is the crux of
all leadership challenges.

Adaptive leadership inspires and equips people to see beyond their own personal goals, security, and visions of success to collaborate to bring about the change necessary for the organization to thrive in a different (and often disruptive) environment.

Since this is not at all natural, the transformation process requires leaders to “keep the work at the center of people’s attention,” and to pace and structure the change process so there is time for the members of the organization to absorb the changes, the losses they must face, and the transformation needed.²

Like a chef trying to slowly sauté onions so that they will become softened, browned, and flavorful without sticking or burning, the leader must continually pay attention, adjust the heat, and every now and then stir the pot to keep the process going.

A group facing challenges requires deep transformation into the very best version of who they can possibly be.

“Leadership is disappointing your own people at a rate they can absorb,” Marty Linsky told an interviewer when describing the challenges of adaptive leadership.³ And whenever I quote the line in a seminar or speaking engagement, it always gets a laugh and a lot of nodding heads.

Leaders recognize themselves—and the challenges confronting them—in this statement. They understand now, if they didn’t when they took the job, that unlike being a manager who fixes problems, sorts out solutions, makes plans that align, and allocates resources (and thus make people happy!), leaders often are faced with taking people through a process of personal and organizational transformation in order to face these disruptive challenges in front of them.

ADAPTIVE CHALLENGES...

1. REQUIRE LEARNING



2. RESULT IN FACING LOSS



3. REVEAL COMPETING VALUES THAT MUST BE NAMED & NAVIGATED



4. REQUIRE EXPERIMENTATION & FAILURE



5. RESULT IN RESISTANCE THAT MUST BE FACED WITH RESILIENCE



It is a process that they often resist and a reality that makes leading any group of people really hard. To be sure, when we took on a leadership challenge, we naturally assumed that there would be challenges and that some days would be hard. ("It's the hard that makes it great!" as Tom Hanks's gruff baseball manager character in *A League of Their Own* said.) But what most of us didn't expect is how hard it would become *to lead the very people who asked you to step into the leadership role*. We didn't really expect to have to face resistance and even opposition from the staff, partners, and board members who asked us to take on the challenge. We figured they would have our backs and that they were ready for the rough road ahead.

Until we realized that they weren't.

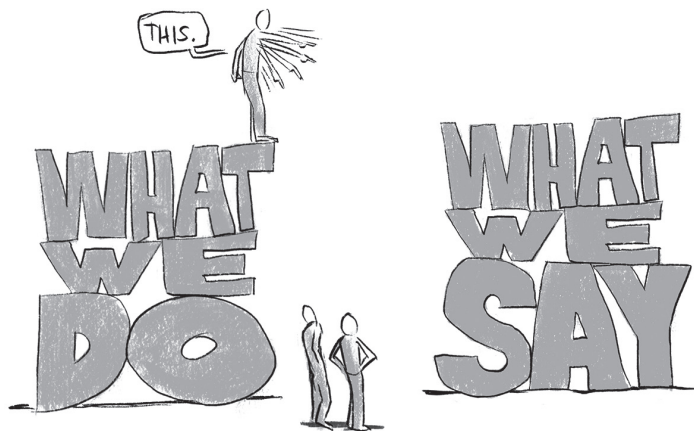
The often subconscious expectation of our people was that we would make things better *for them*. We would “right the ship” or “trim the sails” or get us going “full steam ahead.” They may have expected that there would be some rough seas, but mostly they assumed that our leadership would make an organization (one they belong to and have invested in) a more efficient and effective version of what it already is. The hard news to deliver is that a group facing challenges requires deep transformation into the very best version of who they can possibly be—transformation that requires people to endure *loss*.

Those losses are not just cosmetic but go to the level of personal and organizational identity:

- Reevaluating legacy commitments
- Reconsidering unspoken loyalties
- Shifting unquestioned behaviors and attitudes
- Especially: naming and navigating competing values

Adaptive leadership confronts the gaps in what we *say* we believe and what we actually *do* each day. It queries people on where they need to grow and what they need to learn.

And most painfully, adaptive leadership asks people to face what they must leave behind in order to move the organization forward into uncharted territory.



CHANGE AND LOSS

"People don't resist change, they resist loss," Heifetz and Linsky have taught us.⁴

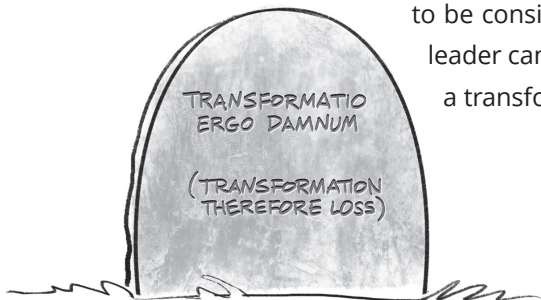
And this reality helps us better understand the most delicate skill required of change leaders: to utilize both empathy and courage to shape the "disappointment" of your own people . . . *at a rate they can absorb*, as Linsky so memorably put it. To bring about transformation without losing all trust from your people, to pace the transformation in a way that will enable you to invest the trust you have in the process, ultimately leads to your organization becoming people who can face the necessary losses and take on the challenges in front of them.

Adaptive leadership asks people to face what they must leave behind in order to move the organization forward into uncharted territory.

That's what this book is about. It is about learning the skill set and developing the *adaptive* mindset that moves from trust to transformation. Together we will learn how . . .

- to build a high-trust account that you can invest in transformation;
- to work collaboratively to restore trust when your change processes have (understandably!) depleted it . . . so you can then invest again in transformation;
- to then restore it again and invest again; and
- to repeat.

These steps require us to understand even more deeply the dance between trust and transformation—and how desiring to be considered a trustworthy leader can keep us from being a transformational one.



CHAPTER 2 OLD MINDSET: SECURE LEADERS MAINTAIN A BIG TRUST ACCOUNT

Writing in the wake of the 9/11 bombings, leadership expert and author Margaret Wheatley responded to the question of how leaders and teams could learn to plan ahead when the world was so volatile. How might leaders get better at predicting what the future will bring?

She waved the question aside.

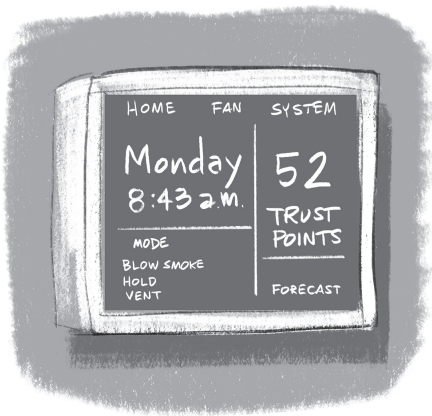
You can't predict the future, Wheatley wrote, but "it is possible to prepare for the future without knowing what it will be. The primary way to prepare for the unknown is to attend to the quality of our relationships, to how well we know and trust one another."¹

If that answer leaves you with a heaviness in your heart, you are not alone. Trust in organizations, institutions—even trust in neighbors—has been declining at a rate that many previously thought unthinkable.² Even more, the lack of trust in leaders—either political, institutional, corporate, even religious—led one author to write about "the scandal of leadership."³



When the books don't balance, the public and private messages don't align, the decisions made seem more for personal gain than for the organizational good, trust evaporates quickly. Psychologist and executive coach Jim Osterhaus explains that while trust increases from the congruence of leaders repeatedly doing what they say, the trust level goes down when the words and actions don't match. According to Osterhaus, "Trust is gained like a thermostat and lost like a light switch." A leader builds trust slowly over time by constantly monitoring the conditions and actions that create the "climate" of trust in the room. But even one action, if perceived as incongruent, can make the levels of trust plummet into darkness.⁴

When trust has fallen to the place where leading anywhere is impossible, there is nothing else to do except restore it. For



example, when an institution wants to embark on a building renovation project, if there is no money in the bank, then the renovation work must stop. The bank account of trust needs to be replenished.

To restore the trust account, a leader needs both

technical competence and relational congruence.⁵ Technical competence is the sense that leaders are doing everything within their power and their job description to be as effective as possible. Before they can call a group to change and grow, leaders must demonstrate that they have the ability to serve the needs of their charges right where they are. Before they call people to take on the challenges of the uncharted territory in front of them, they must demonstrate that they can ably navigate the most basic expectations they have been authorized to accomplish. Before an organization will even *consider* undergoing costly change, there must be a sense that the leadership is doing its job. Because change is so potentially painful, therefore, transformational leadership then does not *begin* with transformation.

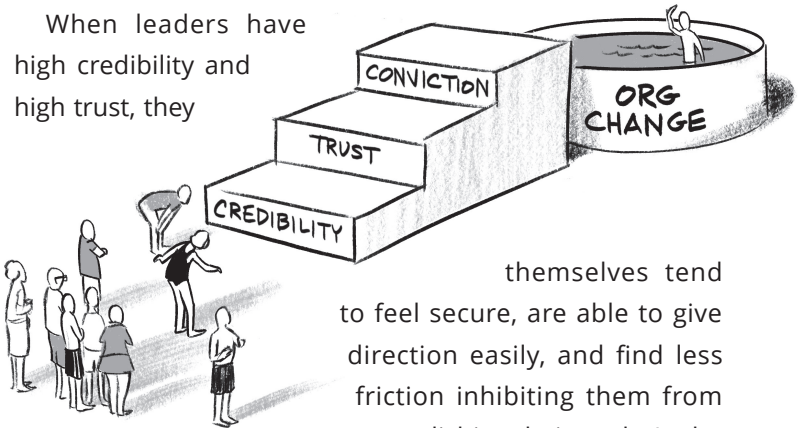
It begins in *competence*.

Now, certainly, if technical competence is the *only* criteria for leadership, it can lead to significant problems (numerous scandals led by “the smartest people in the room” immediately come to mind), so genuine trust in leadership is more than just credibility that comes from *technical competence*; it also requires *relational congruence*.

Relational congruence is the way that leaders show up for the people “entrusted to their care.”⁶ Relational congruence is the personal capacity—the emotional intelligence, the moral character, the ability to listen and communicate—to

uphold values and protect the relationships, the integrity, and the culture of the organization. When leaders function with relational congruence, they strengthen the bonds, deepen the affection, and create the wellspring of trust needed to face the unknown challenges of a changing and disrupted world.⁷

When leaders have high credibility and high trust, they

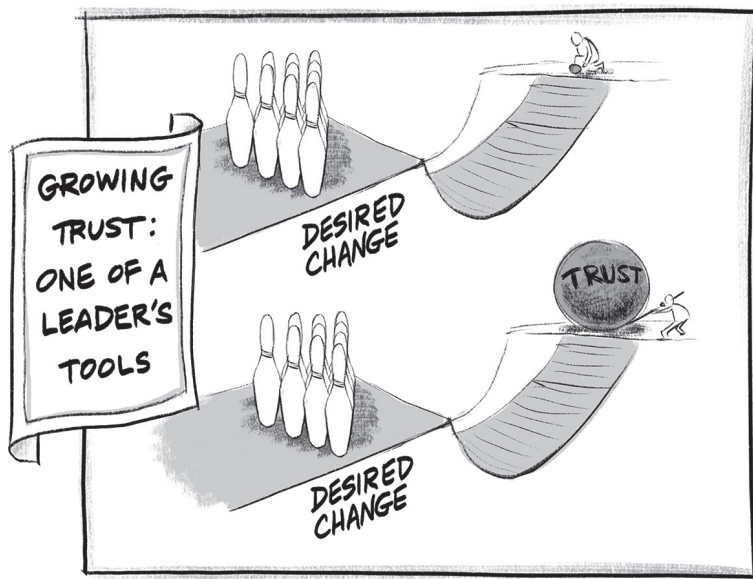


themselves tend to feel secure, are able to give direction easily, and find less friction inhibiting them from accomplishing their goals. In the

words of Stephen M. R. Covey, “Nothing is as fast as the speed of trust,” and “once you create trust—genuine character-based and competence-based trust—almost everything else falls into place.”⁸

WHEN TRUST IS NOT ENOUGH

It is completely understandable, then, for leaders to assume that their main responsibility is to build a big trust



account—that building and maintaining trust is the most important part of their leadership responsibilities. It also makes sense for leaders to believe that the most important metric of their success is the degree to which they are trusted by the key people in the organization. Like a bank account, when the “trust fund” is high, the leader is succeeding; when trust declines, the leader’s own performance is declining. Right?

Or . . . have we misunderstood what leadership is really all about?

Leadership is not managing the current resources and culture of the organization to keep the business going. That is management. Management is a critical and important task. (And good management is critical to high trust!) It is not beneath leadership in the hierarchy of importance, it is just a different task than leadership, with a different objective.

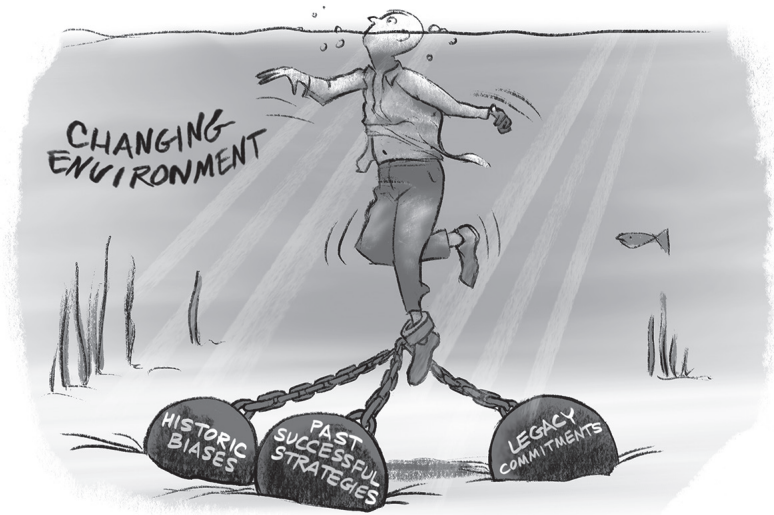
Management is taking care of the people, priorities, and resources “entrusted to your care” and executing on the plan and goals that you have been authorized to take on. Management maintains high trust because management has a big agenda, a long to-do list, a set of critical objectives and key results that have to be executed on and accomplished.⁹ Management, according to John Kotter, is “about coping with complexity.”¹⁰ It is about getting the various goals and groups, factions and facts, commitments and conditions, products and processes aligned and functioning well together.

Management is about coping with complexity. Leadership is about navigating change.

Have we misunderstood
what leadership is
really all about?

Leadership is measured by the transformation of a people who are facing challenges that require change. Leaders for a

time of change and disruption, then, should not be measured just by high trust, but instead by organizational missional transformation. It is a process that is often marked by the need to address challenges for which there are no easy answers nor best practices.



This kind of leadership—adaptive leadership—requires the group to let go of historic biases, legacy commitments, and the trusted strategies of the past; to navigate competing values, experiment, and face failures; and to demonstrate resilience in the face of resistance.

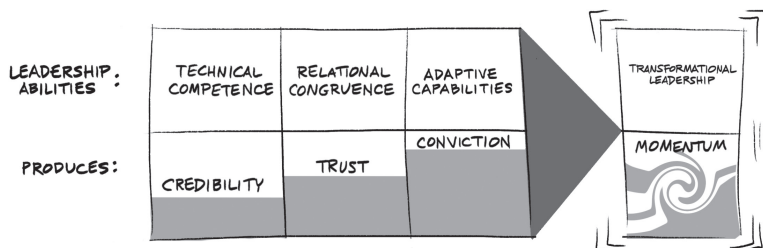
In other words, if taking the Israelites to the Promised Land had just been a management problem, then they would have been able to navigate the wilderness in about six weeks, but as an adaptive leadership challenge, it took forty years. For the once-enslaved people of God to become a new nation that could live freely and offer an example of hope and witness to the world would require the kind of deep spiritual makeover that would disrupt most of their expectations when they were freed on that night of Passover.

Leaders for a time of change and disruption should not be measured just by high trust, but instead by organizational missional transformation.

Truly transformational leadership, then,

- *begins* in technical competence: the skills and abilities that serve, manage, and preserve the organization and its current work;
- is *validated* in relational congruence, that is, the character, care, and constancy that creates the organizational health and personal trust that enables people to stay together even when things go awry; and
- *becomes transformational* through adaptive capacity, that is, the ability to wisely shift (and sometimes leave

behind!) values, attitudes, and behaviors in order to grow and discover solutions to the greatest challenges brought on by a changing world.¹¹



So, let's be doubly clear-headed about what can be a daunting reality.

There is no transformation without trust.

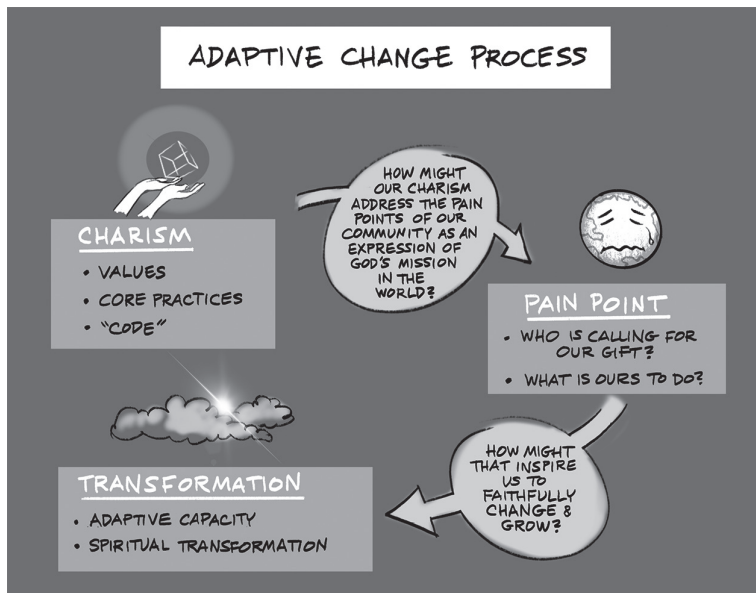
But trust is not transformation.

Deep transformation requires a high degree of trust. But that trust alone doesn't bring transformation. Leading change requires trust to be *invested* in transformation. Trust cannot be stockpiled for a leader's own personal security, and it certainly cannot be squandered for a leader's own personal comfort and status. Trust is a valuable commodity that must be utilized wisely and well in a deep process of personal and organizational transformation.

So, then, how do we go about investing trust for transformation? *Through taking on actual adaptive challenges together.*

IDENTITY, CALLING, AND TRANSFORMATION

When we describe this adaptive process with faith leaders, we use a diagram that is focused around two big questions.



These questions are demanding. They require us to reflect on our organizational identity, our sense of missional calling, and the necessity of transformation that is at the heart of adaptive work.

We'll take the time to unpack them in detail, but for now, notice how these questions are not the kinds that can be solved easily or even individually by one gifted authority

figure. Notice how they require discernment, collaboration, and tough decisions.

The two questions are these:

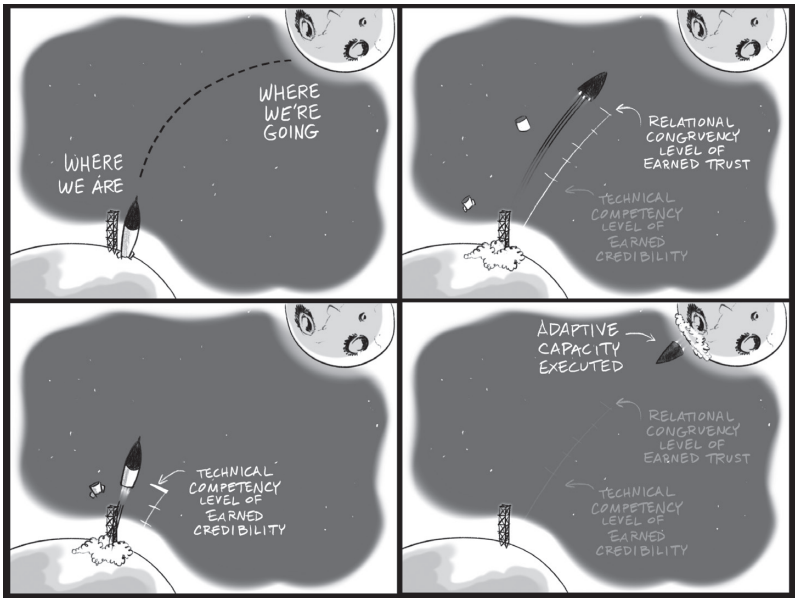
- How might our charism address the pain points of our community as an expression of God's mission in the world?
- How might that inspire us to faithfully change and grow?

These questions focus attention on what is most important about our organization (the gift of our values and identity, which come from the history and identity that make each organization unique, or what we call an organizational *charism*), what point of pain in our community or world is calling for our charism, and the deep change needed for our organization to live out that calling in the world.

As a team works together on the kinds of problems and tasks inspired by questions like these, they are stretched beyond their best practices, they are required to acknowledge a lack of expertise, and they must face the reality that they will likely have to let go of a lot of what they have historically depended on. In confronting these questions and the transformation needed, they slowly develop *adaptive capacity*—the capacity to apply and adapt their most sacred core values so that their mission will thrive in this new environment.¹²

When a team works together on these questions with *enough* trust in the leadership and in the group as a whole

to begin to identify and confront these larger, underlying, adaptive challenges, then the team as a whole begins to develop humility for learning, empathy, courage for facing losses, and discernment for naming and navigating competing values. As they begin to experiment, to face failures, and to develop resilience in the face of the resistance, they “spend down” the trust that they have earned to hold onto those who will pull back when the losses mount up, the failures pile up, the uncertainty increases, and the learning hasn’t yet caught up to the reality of the moment.



So how does a leader help a team stay focused on this most difficult assignment? How does she take the organization through the process of transformation without losing all of the trust needed to “stay alive”? Through, in the words of Marty Linsky, “disappointing your own people *at a rate they can absorb.*”

“At a rate they can absorb.”

Change leaders need a process that will enable them to engage people in their own transformation at the right pace and without wasting the time or opportunity necessary for the transformation to occur. *The old mindset of storing up trust must give way to a new adaptive reset of investing trust in transformation.*

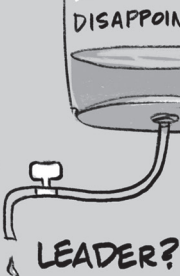
This reset is developed through a new skillset:

1. Creating a holding environment (Your people can trust that the transformation is being shaped by the genuine work of discernment held by a trustworthy team.)
2. Clarifying your charism (Your people can trust that even as they prepare to change, what is most precious and important about the organization will be preserved.)
3. Paying attention to pain points (Your people can trust that the necessary changes are going to make a real difference in the world.)


BALCONY SESSION



1 WHAT IS YOUR FIRST RESPONSE to the DEFINITION of LEADERSHIP as "DISAPPOINTING YOUR OWN PEOPLE at a RATE THEY CAN ABSORB"? HOW HAVE YOU EXPERIENCED or LIVED OUT that DEFINITION EITHER as a LEADER or ONE WORKING WITH a LEADER?



2 THINK BACK on YOUR LIFE WORKING WITH DIFFERENT LEADERS. WHO IS the MOST TRUSTWORTHY LEADER YOU KNOW? WHAT is it ABOUT THEM that MADE THEM TRUSTWORTHY?



3 IF THAT TRUSTWORTHY LEADER WAS GOING to MAKE CHANGES that WOULD be PERSONALLY PAINFUL for YOU or DIFFICULT for YOU to ADJUST to, WHAT WOULD YOU NEED FROM HIM or HER?



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