Preliminaries

It would be wonderful if we could just be inspired to the degree that all of the good things for which we long simply happen. But somewhere between inspiration and realization there is a lot of perspiration!

The adaptive challenge for congregational revitalization is not programmatic, but rather cultivating the "capacity to understand and live in an environment that is no longer experienced as stable, predictable or even comprehensible." (Watkins, Mohr and Kelly 2011, 2)

The four most common sources of leadership failure teach us that for an organization to thrive, leaders:

1. shift their focus from problems to realizing more of what we want (Watkins, Mohr and Kelly 2011)
2. meet adaptive challenges with adaptive solutions (Heifetz and Linsky 2002) Ronald Marty (the focus of this handout)
3. understand and overcome their organization's immunity to change (Kegan and Lahey, How the Way We Talk Can Change the Way We Work 2001)
4. navigate transitions successfully (Bridges 2009)

These tools have been used successfully in both church and corporate settings to cultivate the "capacity to understand and live in an environment that is no longer experienced as stable, predictable or even comprehensible." (Watkins, Mohr and Kelly 2011, 2) An organization's "capacity to understand and live in an environment that is no longer experienced as stable, predictable or even comprehensible" (Watkins, Mohr and Kelly 2011, 2) is the single most important factor in predicting whether an organization will experience increased vitality and thrive, or die.

Basic Dynamics of an Organization

Organizations have a visible and an invisible component. Both are very real and alive and impact the health and vitality of your organization. Take note of the green (center) line in the figure below. Notice what is above it and what is below it.
Visible parts of an organization reside "above the green line." [Rational Outcomes]

- **Structure** - the ways in which a system organizes itself to conduct business.
- **Process** (operations) - the standard business processes that are used to build consistency and efficiency.
- **Patterns** (or strategy) - the systematic ways in which a system accomplishes its mission and goals.

Technical problems and their solutions live in the visible part of the organization. Technical problems are those challenges that require application of authoritative expertise, standard operating procedures, to improve behaviors or routines, increasing performance (more-better strategies). Technical problems are:

1. Easy to identify
2. Often solved by quick and easy (cut-and-dried) solutions
3. Often resolved by an authority or expert (the person responsible in the structure for that process/strategy can make the fix)
4. Limited in scope thus demanding change in just one or a few places. They are often contained within organizational boundaries (a committee, a program, etc.)
5. Generally accepted by people within the organization. People are receptive to technical solutions because they represent a minimal loss or a gain.
The work and the behaviors of people in the organization are part of the visible part of the system. This is the part of organizations that supports the model of organizations as machines. These components of a system tend to be stable, predictable, and comprehensible. While attention to these three components of organizational life are absolutely necessary, they are not sufficient to sustain change or insure intended outcomes. Change and its accompanying transition evokes instability and unpredictability, and exceeds the current understanding within the system.

The invisible parts of an organization are those depicted “below the green line” [Experiential Outcomes] in figure 1. They are essential to organizational health and sustainability. The three invisible components of a system are:

- **Information** - reflects the nature of how information is shared, utilized in decision-making, and the degree of transparency critical information achieves with all stakeholders in the system.
- **Relationships** - how teams or organizations value people – their emotional, physical and spiritual well-being; the level of connectivity among people across the system; the value placed upon collaboration and high functioning teams; and the level of connectivity of and the type of relationship between key teams, programs and operational systems. It is not just the traditional understanding about a focus on people getting along and liking each other.
- **Identity** - the level of shared purpose, meaning, passion, beliefs, values and principles of people, teams and the organization as a whole.

In some ways information is like the vital nutrients for the living system, relationships are the conduits that infuse nutrition throughout the system, and identity is the concept or framework (mind) that organizes the system into a unique entity. All three are essential to the well being of the whole. All three areas are completely interconnected.

**Margaret Wheatley suggests that to facilitate the kind of adaptive change and growth needed for organizations to thrive, special attention needs to be paid to the open and free access to information and developing relationships based on mutual respect and care. In so doing, people in the organization can develop a deep sense of identity based on shared values and purposes. (Wheatley 2006)**

The beliefs and values, both individual and organizational, which evolve from assumptions, feelings and emotions are part of the invisible part of an organization. Individual roles, ambitions and aspirations, organizational visions and the psychological histories of individuals and organizations are all part of the invisible system.
Adaptive challenges and solutions live in an organization’s invisible strata. (Heifetz and Linsky 2002)

By definition, adaptive challenges:

1. Are difficult to identify (easy to deny)
2. Require shifts in or new values, beliefs, roles, relationships, and approaches to work
3. Can only be solved by the people with the problem; authority figures advise, teach, train and coach because they deal with experiential outcomes
4. Involve change in numerous places; usually cross organizational boundaries often simultaneously
5. Carry a high degree of loss and thus meet with great resistance
6. Invite experiments and new discoveries; they can take a long time to implement and cannot be implemented by edict.

How to recognize the presence of an adaptive challenge.

1. People need to open themselves to new attitudes, heart, mind; not just new behaviors are called for. New learning is required. The choice at hand is between values that appear to contradict each other. A real loss and grieving of the loss are involved.
2. A series of technical solutions (operations, strategies, structures) failing to achieve the desired result often indicates an underlying adaptive challenge has yet to be addressed. (often determined by the process of exclusion)
3. Persistent conflict often indicates resistance to or a failure to have made adjustments or accepted the losses that accompany adaptive change.
4. Crisis. By definition a crisis is a destabilizing situation for which we have no previously known mechanisms by which to cope. Crises involve deep emotion, high pressure, urgency to restore balance quickly (often increasing the attractiveness of technical solutions).

The invisible part of an organization supports the model of organizations being living systems.

All living systems have the capacity to self-organize, to sustain themselves and move toward greater complexity and order as needed. They can respond intelligently to the need for change. They organize (and then reorganize) themselves into adaptive patterns and structures without any externally imposed plan or direction.
Self-organizing systems have what all leaders crave: the capacity to respond continuously to change. In these systems, change is the organizing force, not a problematic intrusion. Structures and solutions are temporary. Transition is a normal state of being. Resources and people come together to create new initiatives, to respond to new regulations, to shift the organization's processes. Leaders emerge from the needs of the moment. There are far fewer levels of management. Experimentation is a norm. Local solutions predominate but are kept local, not elevated to models for the whole organization. Involvement and participation constantly deepen. These organizations are experts at the process of change and transition. They understand their organization as a process of continuous organizing.

Self-organization offers hope for a simpler and more effective way to accomplish work. It challenges the most fundamental assumptions about how organization happens and the role of leaders. But it is not a new phenomenon. We have lived our entire lives in a self-organizing world. We watch self-organization on TV in the first hours after any disaster. People and resources organize without planning into coordinated, purposeful activity. Leaders emerge and recede based on who is available and who has information. Everything happens quickly and a little miraculously. These self-organized efforts create effective responses long before official relief agencies can even make it to the scene. (Wheatley and Kellner-Rogers 1996)