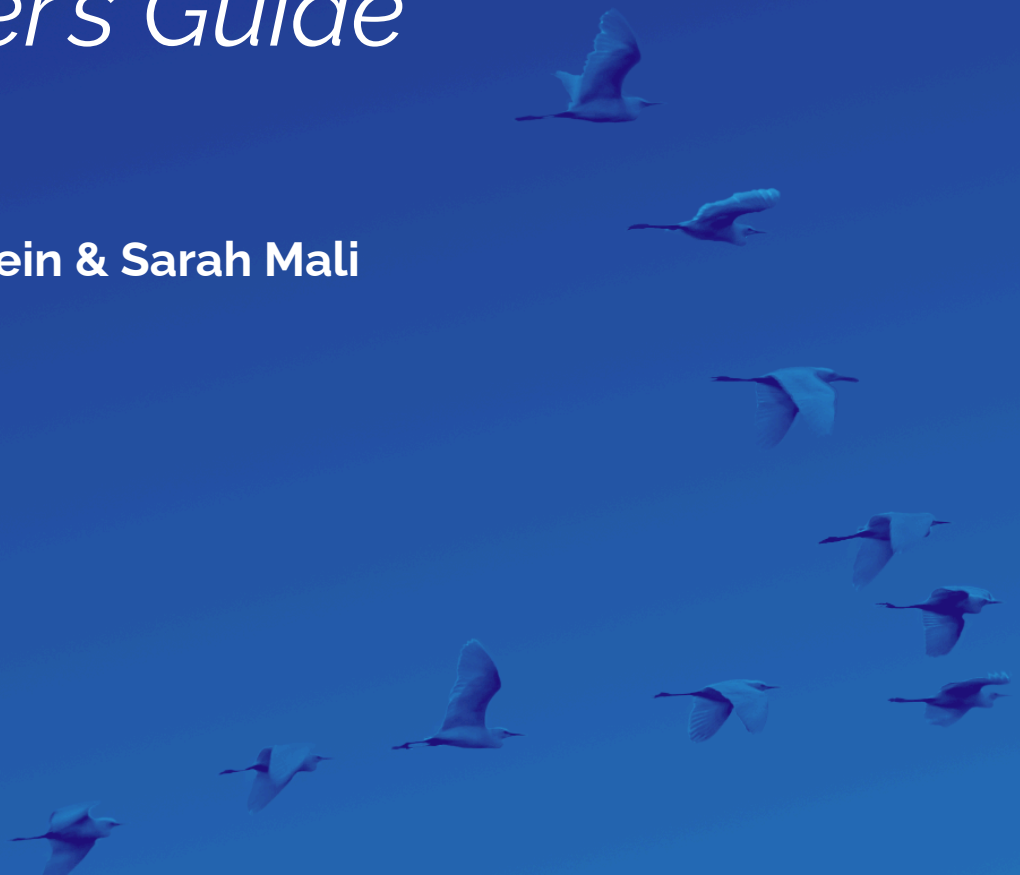# Unit 3

Diagnosing the Challenge
Learner's Guide

Maya Bernstein & Sarah Mali

SYNOPSIS

This unit aims to explore the differences between what people might think or say the leadership challenge they are facing is, versus what it really is. So often, we think we have accurately "diagnosed" the challenge, when in fact we are still only surface-deep. In order to make progress and to bring about change, we must first have the ability and courage to identify the multi-faceted nature of the problem we are striving to solve.

> *It is far easier to be a technical leader than an adaptive one. It is easy to leave it to God, hard to realize that God is calling us to responsibility, to become His partners in the work of redemption...Adaptive leadership is, for Judaism, the highest form of leadership. That is what the Prophets did. Without relieving the people of their responsibility, they gave them a vision and a hope. They spoke difficult, challenging truths, and they did so with a passion that still has the power to inspire the better angels of our nature.*

Rabbi Sacks,
www.rabbisacks.org/covenant-conversation/behaalotecha/two-types-of-leadership/

This unit helps us understand how to identify and categorize the kinds of challenges we are facing, so that we can respond appropriately. We will unpack the distinction between "technical" and "adaptive" challenges, and explore what leadership might mean in each context.

EDUCATIONAL GOALS

Learners will emerge from this session with the following enduring understandings:

- Diagnosing the problem is at the heart of successful leadership work

- Leadership work is adaptive; it requires changing people's hearts and values and their sense of identity

- Technical work, in which the problem is identified and solvable with expertise, is part of leadership, but only one piece of the puzzle; this work is the authority figure's responsibility

- Don't accept the first (few) interpretations of the problem; dig deeper.

INTRODUCTION

In this session, we introduce the importance of diagnosis in leadership work. If we have not accurately defined the problem, we are unlikely to make progress on solving it.

> *Technical problems live in people's heads and logic systems. They are susceptible to facts and authoritative expertise. Adaptive challenges live in people's hearts and stomachs. They are about values, loyalties, and beliefs.*

Kansas Leadership Center,
www.kansasleadershipcenter.org/distinguish-technical-and-adaptive-work/

Diagnosing the Leadership Challenge

What were the Jewish people complaining about upon leaving Egypt? Was it really the food or was it something else? This session looks at how to distinguish between challenges that have a technical explanation and solution and those that are more complex and require a shift in behavior and values. We refer to Jewish texts that help illuminate this distinction.

> *The Jewish people right now needs leaders, people unafraid to face the challenges of today and build for tomorrow instead of, as so often happens, fighting the battles of yesterday...the world changes and leaders help us to adapt to the new without breaking faith with the old...take on one leadership challenge, however small, that you may not have done before.*

Rabbi Sacks, (Lessons in Leadership, "Introduction", xxviii)

Corridor to Learning

Often, what we understand is different from what is actually said. This session will be focusing on the complexity of interpretations and diagnostic work. As you go through the learning, keep track of the following chart; you will check in about it at the end of the session. Try to capture "What Was Said" as close to verbatim as you can. Then, reflect on what went through your head when that comment (made either by yourself or by someone else in the group) was shared.

Exercise from Alexander Grashow, Marty Linsky, and Ronald Heifetz (The Practice of Adaptive Leadership, p. 84)

What Was Said	What I Thought

What is Art and Who Decides?

Watch this clip from the movie Mona Lisa Smile:
https://www.youtube.com/watch?v=7bLUG4g0cVc

In this movie, Julia Roberts plays Katherine Watson, a recent UCLA graduate (who didn't receive her Ph.D), who was hired to teach art history at the prestigious all-female Wellesley College, in 1953. In this first scene, the students have prepared for class based on the syllabus, and Katherine's authority is challenged.

Reflection Questions:

-What is the "problem" Watson is trying to solve in this first scene? How do you think she would frame her leadership challenge?

-Who has authority in the scene? Why? How? Who has informal authority? Why do the students challenge Watson's authority? How do they succeed?

-What does this scene teach you about authority and technical challenges?

Now watch this second clip from the movie:
https://www.youtube.com/watch?v=yYxCZpbKsAs

This is a very different scene. Think about Watson's authority and how she regains it. Think about how she might be redefining her leadership challenge. What is her purpose? How does she switch tactics to tackle it?

Reflection Questions:

-How does Watson challenge her students to think differently? Is she effective? What works? What doesn't?

You can understand the distinction between "technical" and "adaptive" challenges from these two scenes. The first reveals a technical challenge: learning material, reading books, and proving to the authority figure - the instructor - what you've done. It takes time, expertise, and intelligence. But, it doesn't get at the heart of the issue, the adaptive area. Adaptive challenges present questions that book-learning cannot solve. What is art? Who decides? What is beautiful? Who decides? Adaptive issues require the people with the problem to take responsibility for coming up with the solution.

-What do you notice about how the students respond? How does that inform the way you think people might respond when confronted with an adaptive challenge?

-Go back to thinking about what might have been "hard" or "easy" about taking this class. How does it resonate with the themes that emerge from this clip?

-Share your discussion with the larger group. What feels threatening about making change?

FRAMING

It is helpful to **diagnose** the leadership challenge. If you do not accurately define the problem, it is likely that you might just be perpetuating the status quo.

We find it useful to use the lens of "technical" challenges vs. "adaptive" challenges when thinking about leadership opportunities. Here is one definition of the difference between these two kinds of problems:

> *Technical problems (even though they may be complex) can be solved with knowledge and procedures already in hand. In contrast, adaptive challenges require new learning, innovation, and new patterns of behavior. In this view, leadership is the activity of mobilizing people to address adaptive challenges*

Sharon Daloz Parks (Leadership Can Be Taught, p.10)

Or, as Rabbi Sacks puts it:

> *A technical challenge is one where you have a problem and someone else has the solution. You are ill, you go to the doctor, he diagnoses your condition and prescribes a pill. All you have to do is follow the instructions.*
>
> *Adaptive challenges are different. They arise when we are part of the problem. You are ill, you go to the doctor, and he tells you: I can give you a pill, but the truth is that you are going to have to change your lifestyle. You are overweight, out of condition, you sleep too little and are exposed to too much stress. Pills won't help you until you change the way you live.*
>
> *Adaptive leadership is called for when the world is changing, circumstances are no longer what they were, and what once worked works no more. There is no quick fix, no pill, no simple following of instructions. We have to change. The leader cannot do it for us.*

Rabbi Sacks,
www.rabbisacks.org/covenant-conversation/behaalotecha/two-types-of-leadership/

Like Katherine Watson in her first class, teachers often approach their students' learning as technical. The problem is clear - the students need to learn to identify certain works of art, when they were made, in what style, and by whom; and the solution is clear - expose them to textbooks, teach them history, show them works of art, give them lenses through which to look at those works.

But Katherine Watson tried to reframe the problem as adaptive. The problem itself wasn't even clear - what is good art, anyway? Why is it that certain people have the authority and power to declare what is good and what is not? What is going on in the broader system -

power dynamics, gender dynamics, racial dynamics - that complexify and affect these questions? How do we begin to answer these questions? How does that affect how art is made and taught? This is all very threatening to the university system, which expects Watson to come in, show her slides, assign reading, and not cause any disturbance in the status quo.

Adaptive challenges require leadership. Those who have authority in the system cannot simply do what they've always done, and tell people what to do. They need to reframe the challenge so that people think, and act, for themselves. They need to bring the nuances and complexities to the table, and often end up threatening the way things have always been, for the sake of the future.

These charts offer a lens to understand the distinction between "technical" and "adaptive" work:

Kind of Work	Problem & Solution Definition	Locus of Work	Type of Work
Technical	Clear	Authority	Optimize Execution
Technical & Adaptive			
Adaptive	Requires Learning	Stakeholders	Experiment & Smart Risks

Technical and Adptive Challenge Overview	
Technical Challenge	**Adaptive Challenge**
Clearly identified	Difficult to identify (easy to deny)
Effective, applicable solution	Requires changes in values, beliefs, and approaches to work
Requires small changes within known boundaries	Require a lot of changes across many, sometimes unknown, boundaries
Can be solved by expert or 'authority'	Solved by people with the problem
Solution can be implemented quickly	No quick fixes, requires constant experimentation
Increased efficiency/decreased learning	Decreased efficiency/increased learning

...we look for the wrong kind of leadership. We call for someone with answers, decision, strength, and a map of the future, someone who knows where we ought to be going - in short, someone who can make hard problems simple...Instead of looking for saviors, we should be calling for leadership that will challenge us to face the problems for which there are no simple, painless solutions - the problems that require us to learn new ways.

Ronald Heifetz (Leadership Without Easy Answers, p. 2)

Part of what is so challenging about tackling adaptive work, which we are defining as stepping into leadership, is that our core values and sense of identity, and the core values and senses of identity that others carry, are tested. In the adaptive zone, we are called to challenge and support the shifting in values and identities of those we are striving to mobilize toward change.

HEVRUTA LEARNING & REFLECTION

Find a learning partner, a Hevruta. Spend 15 minutes reading and discussing each text cluster.

Text Cluster I

How can you understand the challenge the Israelites are articulating on both the technical and adaptive levels? Where should Moses use his authority, and where is leadership required?

Exodus 16: 2-3

וַיִּלּוֹנוּ [וַיִּלּוֹנוּ] כׇּל־עֲדַת בְּנֵי־יִשְׂרָאֵל עַל־מֹשֶׁה וְעַל־אַהֲרֹן בַּמִּדְבָּר׃

In the wilderness, the whole Israelite community grumbled against Moses and Aaron.

וַיֹּאמְרוּ אֲלֵהֶם בְּנֵי יִשְׂרָאֵל מִי־יִתֵּן מוּתֵנוּ בְיַד־יְהֹוָה בְּאֶרֶץ מִצְרַיִם בְּשִׁבְתֵּנוּ עַל־סִיר הַבָּשָׂר בְּאׇכְלֵנוּ לֶחֶם לָשֹׂבַע כִּי־הוֹצֵאתֶם אֹתָנוּ אֶל־הַמִּדְבָּר הַזֶּה לְהָמִית אֶת־כׇּל־הַקָּהָל הַזֶּה בָּרָעָב׃

The Israelites said to them, "If only we had died by the hand of the LORD in the land of Egypt, when we sat by the fleshpots, when we ate our fill of bread! For you have brought us out into this wilderness to starve this whole congregation to death."

Numbers 14:2-5

וַיִּלֹּ֙נוּ֙ עַל־מֹשֶׁ֜ה וְעַֽל־אַהֲרֹ֗ן כֹּ֚ל בְּנֵ֣י יִשְׂרָאֵ֔ל וַיֹּאמְר֨וּ אֲלֵהֶ֜ם כָּל־הָעֵדָ֗ה לוּ־מַ֙תְנוּ֙ בְּאֶ֣רֶץ מִצְרַ֔יִם א֛וֹ בַּמִּדְבָּ֥ר הַזֶּ֖ה לוּ־מָֽתְנוּ׃

All the Israelites railed against Moses and Aaron. "If only we had died in the land of Egypt," the whole community shouted at them, "or if only we might die in this wilderness!

וְלָמָ֣ה יְ֠הֹוָה מֵבִ֨יא אֹתָ֜נוּ אֶל־הָאָ֤רֶץ הַזֹּאת֙ לִנְפֹּ֣ל בַּחֶ֔רֶב נָשֵׁ֥ינוּ וְטַפֵּ֖נוּ יִהְי֣וּ לָבַ֑ז הֲל֧וֹא ט֦וֹב לָ֖נוּ שׁ֥וּב מִצְרָֽיְמָה׃

Why is the LORD taking us to that land to fall by the sword? Our wives and children will be carried off! It would be better for us to go back to Egypt!"

וַיֹּאמְר֖וּ אִ֣ישׁ אֶל־אָחִ֑יו נִתְּנָ֥ה רֹ֖אשׁ וְנָשׁ֥וּבָה מִצְרָֽיְמָה׃

And they said to one another, "Let us head back for Egypt."

Rabbi Sacks (Lessons in Leadership, "Introduction", xxii)

...There is an extraordinary passage in which, after the people complain about the food, Moses says to God, "If this is how You are going to treat me, please kill me now, if I have found favour in your eyes, and let me not see my own ruin" (Num. 11:15). What puzzled me is that people had complained to Moses about the food before (Ex. 16), and on that earlier occasion he had not given way to despair.

What I now realized...was that on the first occasion, Moses was faced with a technical challenge: the people needed food. On the second occasion he was faced with an adaptive challenge. The problem was no longer the food but the people. They had begun the second half of their journey, from Sinai to the Promised Land. They had escaped from slavery; they now needed to develop the strength and self-confidence necessary to fight battles and create a free society. They were the problem. They had to change. That, I now learned, was what made adaptive leadership so difficult. People resist change, and can become angry and hostile when faced with the need for it. "Receiving anger with grace," I read, can be "a sacred task."

Reflection Questions:

- Why do you think the people wanted to go back to Egypt? Respond with both a technical and an adaptive answer.

- What is the story the Israelites were telling themselves? What is the story according to Rabbi Sacks? Discuss the different leadership approaches based on these two stories. How would you intervene to solve the technical problem? How would you intervene to solve the adaptive issues?

- Has anyone in this group offered an adaptive interpretation to a challenge in the group? How has it been received?

- Have you offered any adaptive interpretations into how your group has been working together? If you were to give it a try, what might you say? How does it feel?

- Discuss how the very act of offering an adaptive diagnosis is an act of leadership.

Sifrei Devarim 1:11

ספרי דברים א׳:י״א

(יא) במדבר. מלמד שהוכיחם על מה שעשו במדבר, מלמד שהיו נוטלים בניהם ובנותיהם קטנים וזורקים לתוך חיקו של משה, ואומרים לו: בן עמרם, מה אנונא התקנת להם? לאלו מה פרנסה התקנת להם? ר' יהודה אומר: הרי הוא (שמות טז) ויאמרו להם בני ישראל מי יתן מותנו ביד ה' בארץ מצרים.

(11) "in the desert": We are hereby taught that he rebuked them for what they did in the desert. They took their small sons and daughters and threw them into Moses' lap and said to him? What provisions did you make for these? What livelihood did you provide for them? R. Yehudah says: This ("in the desert") refers to (Shemoth 16:3) "And the children of Israel said to them (Moses and Aaron): Would that we had died by the hand of the L-rd in the land of Egypt!"

Rabbi Sacks (Lessons in Leadership, p. 175)

The Scriptures tell us that, lacking faith in themselves and in God, the Israelites demanded that Moses take them back to Egypt, enslaved but secure. This was not the first time that Moses fell on his face in despair. He had recently pleaded with God to put him out of his leadership misery and put him to death. God refused, suggesting that Moses organize himself better instead. Moses was discovering in the Sinai desert that the hardest part of his job was not to Exodus itself and the challenge of gaining the trust of his people and persuading Pharaoh to let them go. The toughest challenge for his leadership was located in people's hearts and minds, beyond an expert solution he or even God could provide.

Rabbi Sacks

He has to teach them to adapt, but he senses – rightly as it transpires – that they are simply unable to change their pattern of response, the result of years of slavery. They are passive, dependent. They have lost the capacity for self-motivated action. As we eventually discover, it will take a new generation, born in freedom, to develop the strengths needed for self-governance, the precondition of freedom. Adaptive leadership is intensely difficult. People resist change. They erect barriers against it. One is denial. A second is anger. A third is blame. That is why adaptive leadership is emotionally draining in the extreme.

> www.rabbisacks.org/covenant-conversation/behaalotecha/two-types-of-leadership/

Reflection Questions:

- According to Rabbi Sacks, what "adaptive" issues are underlying the complaints of the People of Israel in the desert? Do you agree?

- Have you ever left a situation for something you hoped might be a better change? What was it like?

- What insights can you take from this story about the complexities of leaving even a terrible environment for an unknown future into your understanding of what leadership work feels like for those who are being asked to make change?

INTEGRATION & PRACTICE

Leadership Exercise

Find a new Hevruta and discuss the following questions:

1. Share a leadership challenge you are thinking about. What might it look like to try to "re-diagnose" it? Answer the question: Why is it so difficult to make progress on this?

2. Make a list of the technical components of the problem, and the adaptive components. Remember, the adaptive column should include reflection on what losses progress on the problem might incur, what values it challenges, and what core people or practices it might disturb:

Technical Components	Adaptive Components: "So, What's the Problem?"

Closing Circle

1. Share your charts; how are you thinking about the problem differently?

2. Check in about your "What I Thought and What Was Said" chart from the beginning of the session. Are your interpretations more technical or more adaptive? What did you notice about yourself and others?

TAKE-AWAY EXERCISE

Start differentiating between technical and adaptive challenges in your work and life - try to engage others in a conversation around the more adaptive elements of the story that they might not be exploring.

UNIT LESSON SUMMARY:

Our leadership intervention is only as successful as our leadership diagnosis. If we can differentiate between technical and adaptive challenges, we can decide how to deploy ourselves more effectively.