EDUCATION & TRAINING FOUNDATION

HOW TO LEAD WHEN YOU'RE NOT IN CHARGE

PROGRAMME WORKBOOK

INTRODUCTION

What is this programme about?

You may have sought this programme out because you're finding yourself in situations where it seems increasingly difficult to achieve your core purpose – what you're 'for'.

Within and beyond your own organisation, you're coming up against rules, priorities, practices and people who don't seem to line up with what you feel is really important.

And because they may be in other organisations, or in sectors other than SEND, you may not know them well, or feel you have any influence or authority over them. But at the same time, what you are trying to do matters – to you, to the young people you work with, and to their families.

So it gets frustrating, and you can feel stuck.

Does this sound familiar?

Well, there is bad news and good news. The bad news is that there are no easy answers – no magic wand that will suddenly make things easy, no cunning plans that will get the world to line up as you would like.

The good news is that this doesn't mean you're helpless. You can lead in ways that lead to change. By developing your leadership skills and capacity, you can influence the system for the better and make change happen.

This means seeing leadership as something active, and something for you. Leadership is a verb, not a noun. Leadership is the choice you can make to step up and step in; to decide to take on personal responsibility for making a lasting difference, regardless of whether you are 'in charge' or not.

We talk about 'systems leadership'. In this context, a system represents the collection of organisations, agencies, communities, families and individuals who all interact together in different ways and produce the outcomes we currently get for SEND learners. Think of it as an eco-system, like a garden, rather than as a machine – we'll return to this later.

This programme is about giving you some deeper understanding about how your SEND system works; and offering some skills, tools and light-touch theories to diagnose what is going on and how you might work more effectively with 'what is' as a leader.

During our two days together, we will learn with and from each other, as well as learning about issues that some of the most senior leaders in our public services are also learning about and wrestling with right now.

We will consider, as Myron Rogers puts it:

- how systems work
- how **this** system works, and
- how **I** can work with this system.

This workbook resource and how to use it

There is no way that we can put everything you need to know in a single workbook. For the two days of the programme, we have made choices about the learning, practices and tools that we think can get you 'on your way' with enough confidence and skills to have a go at working differently, and to see what happens.

So this is a set of supporting resources that sits alongside our two days together. The aim of this is to act as:

- a reminder of what we covered
- an opportunity to practise some of the technologies and skills
- a resource for further exploration and reading of the bits that interest you.

CONTENTS

ON LEADERSHIP

The idea here is not to say everything there is to say about leadership: more to try and be specific about the sort of leadership this programme is about, and why it matters to us in our current situation.

The term 'leadership' has often been used interchangeably with management. This is unhelpful, but the distinction between leadership and management, and what that means and actually looks like in your context, is part of what we will be exploring over the programme. Some of the information on this page is a helpful start.

The term **systems leadership** has been around for some years, and many of the ideas within it have deeper roots in leadership, management and organisational thinking.

Recent work by the Virtual Staff College has brought together several strands of thinking and research in a new synthesis[1]. In summary the main points are:

a Systems leadership is a necessary response to volatility, uncertainty, complexity, ambiguity, (VUCA) and to resource pressures.

b It is done within and across organisational and geopolitical boundaries, beyond individual professional disciplines; and within and across a range of organisational and stakeholder cultures, often without direct managerial control of resources. It is a collective rather than individual endeavour; distributed across many levels and roles, having outcomes for service users at its heart.

c System Leaders have skills in **six interacting dimensions of systems leadership**, (put into three groups set out on the next page):

[1] A good summary is available in the Executive Summary of "systems leadership – exceptional leadership for exceptional times – synthesis paper". This and the background research papers are all available via https://www.virtualstaffcollege.co.uk/wp-content/uploads/VSC_Synthesis_exec_complete.pdf

Cognitive (although in practice these are inseparable from emotions)

- **Ways of perceiving**, what we observe and hear; how well we're able to live with the fact that it's not possible to see or know everything we'd like; how well we emphasise seeking and listening to others' views (rather than expounding our own). Stories help us make sense of what happened; they are a powerful way of perceiving. In part this is because they also carry emotions and values. Leaders have an important role in helping the system to distinguish between background noise and significant signals.
- **Ways of thinking** – cognition, analysis and synthesis; how we think, individually and collectively, e.g. the implicit and explicit mental models we use and how useful they are; the evidence we draw upon and how well we use it; helping the system to distinguish between symptoms and causes and make good choices about where to focus[2].

Relational, emotional and values based

In emotion/relations

- **Ways of feeling** – stress on personal values, especially in relation to a focus on service users, personal commitment and resilience.
- **Ways of relating**, especially building deep relationships based on empathy, integrity, honesty and authenticity.

In action

- **Ways of doing**, enabling and supporting others; using influence and 'nudge' rather than formal power (because this may not be available); building alignment around common vision and purpose; using local/place-based initiatives; tolerating risk and accepting multiple pathways to outcomes.
- **Ways of being,** personal qualities, bravery, risk taking, patience/taking the long view; ceding organisational goals to achieve collective ambition.

Overall good leadership in a complex environment is:

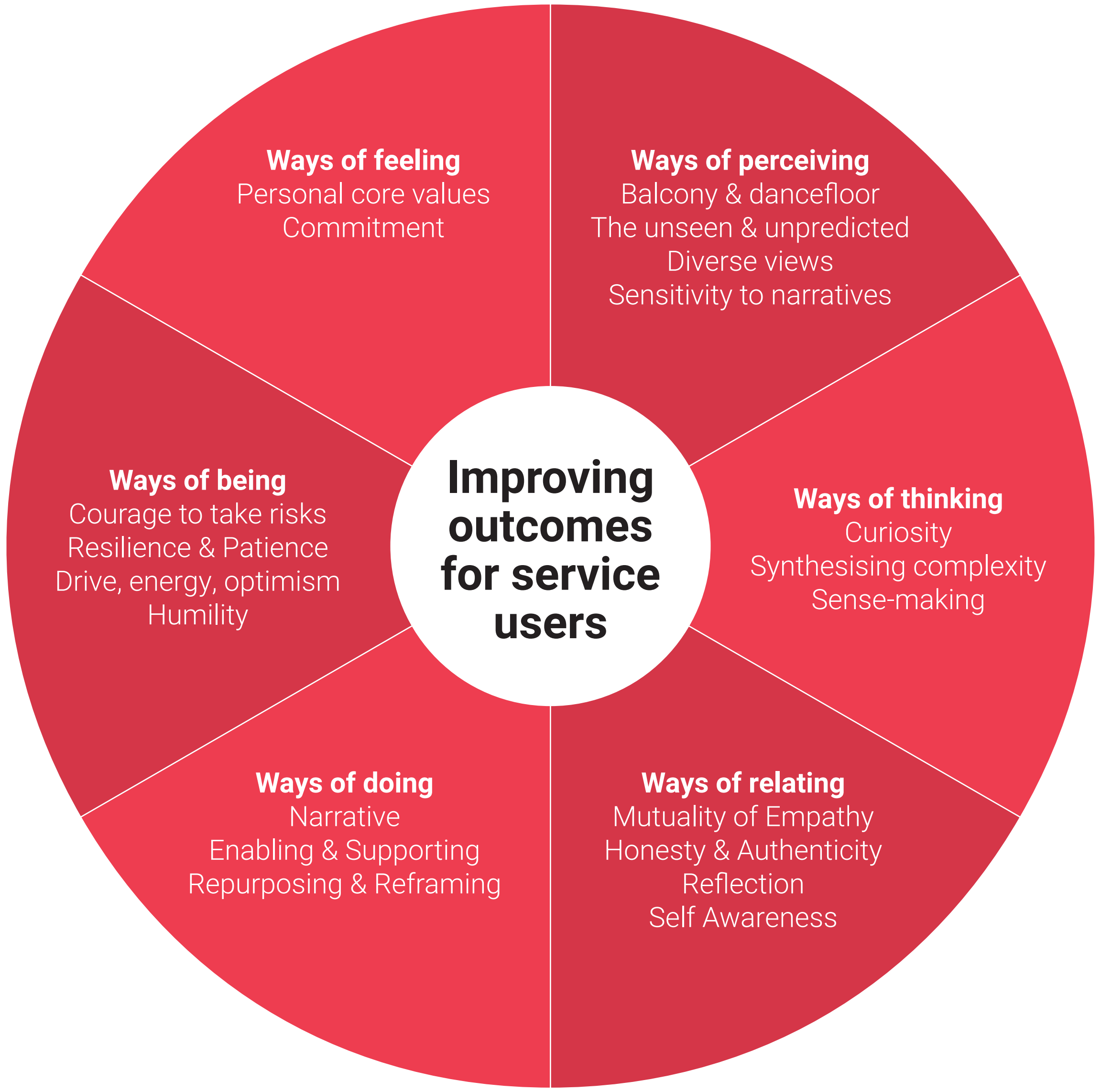
- systemic (not piecemeal or in silos), building shared purpose and vision, being willing to put others first and "repurpose" resources in order to achieve the desired goal;
- emergent - able to move and adapt nimbly, creating spaces for others to act and have the courage to experiment;
- participative - involving many people's ideas, energy, talent, and expertise; reflecting on our own personal qualities and values in action; building good relationships and trust.

[2] It may be appropriate to deal with symptoms but it's better to do so knowingly and be able to explain the rationale.

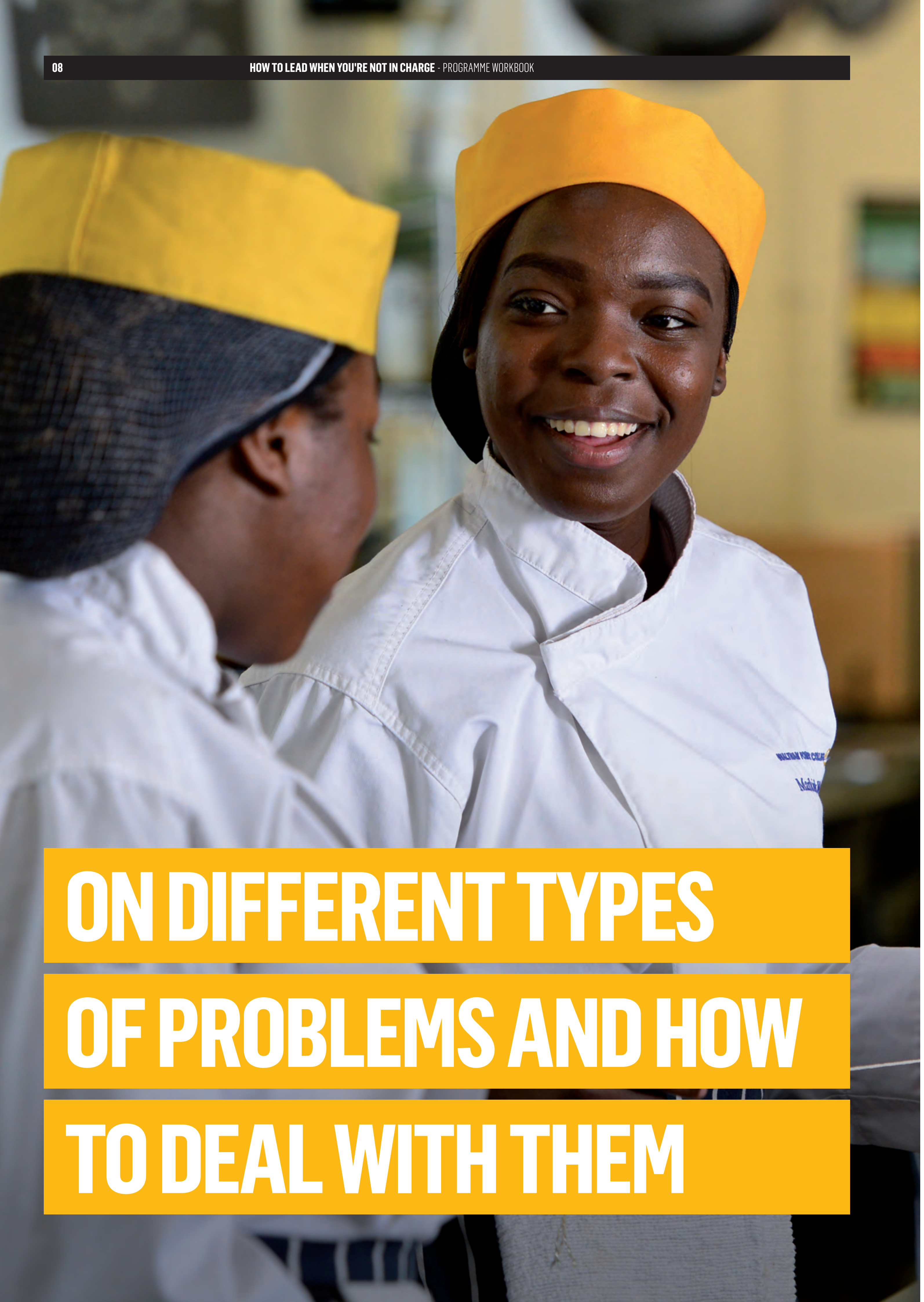
Systems leadership and change

Some related beliefs[3] about change are:

- Real change happens through real work
- Those who do the work need to do the change
- People own what they create
- Key role for leaders is to connect more of the system to itself
- It doesn't matter where you start, as long as you do and follow it everywhere it leads.



[3] See: Myron Rogers, Living Systems, pp21-24 *The Art of Change-Making*, Leadership Centre 2015



ON DIFFERENT TYPES OF PROBLEMS AND HOW TO DEAL WITH THEM

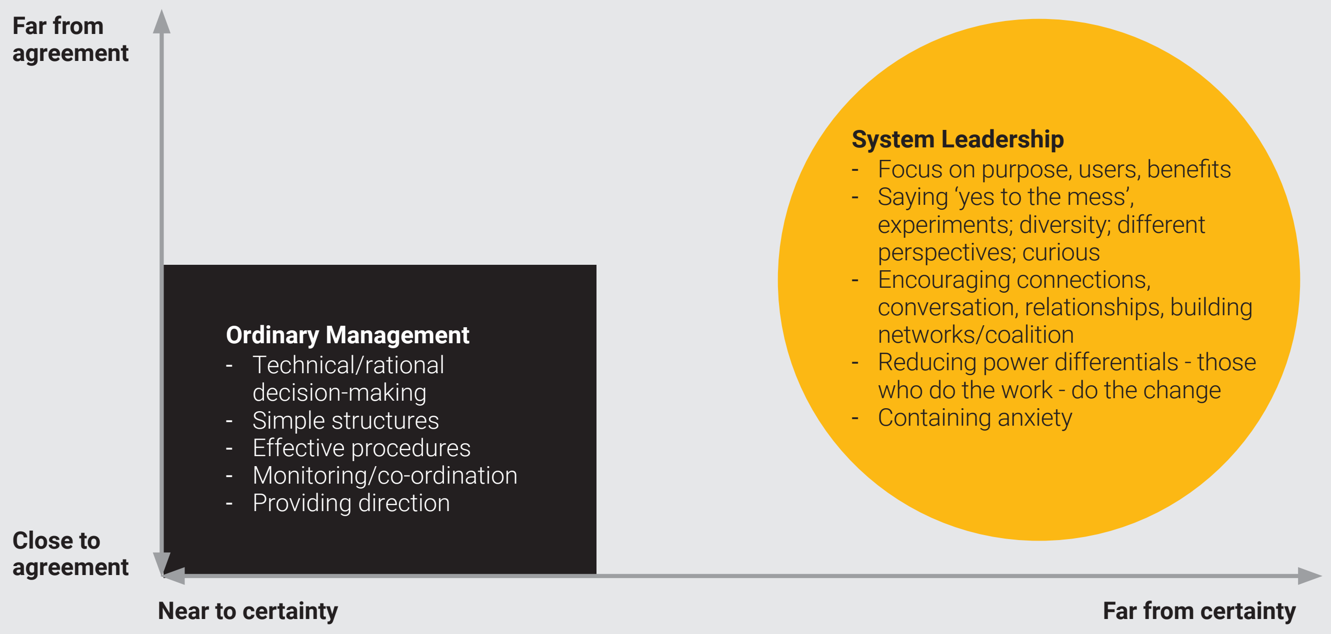
Inevitably, there are a multitude of other authors on this subject, and we do not intend to give a history lesson on the development of these ideas. Rather, we aim to point towards some thinking we feel is helpful for people working in SEND.

Part of the leadership role is distinguishing between straightforward management problems and 'wicked issues', then applying tight performance and project management to the former and systems leadership to the latter. The following diagram, based on **Professor Ralph Stacey's[4]** work, highlights the different approaches and when they are needed.

Stacey's simple yet effective explanation says that when we are close to agreement and close to certainty about the nature of the problem and the solution, we can apply ordinary, effective management approaches and expect a good outcome.

But where we cannot be anything like certain about the true nature of the problem, and the solutions feel even more remote, and where the whole issue is contested, we need to look to the yellow circle for the things we need to focus on. This is leadership in action.

Technical problems v adaptive challenges



After Ralph Stacey

[4] See pp54-56 of *The Art of Change-Making*, Leadership Centre 2015

The work of **Professor Keith Grint**[5], from Warwick University Business School, is worth looking into on this question of the different nature of problems we might face in our organisations and wider systems.

Grint describes the types of problems we might face as tame, wicked and critical, and then sets out how each problem type needs to be tackled.

'Wicked' problems require leadership. So what is a 'wicked problem'?

With wicked problems, the leadership role is to ask the appropriate **question** – and to avoid the rush to decision. This often means to hold a space and to work with the pressures you might feel upon you to come up with an answer.

Professor Ronald Heifetz[6] of Harvard University talks about technical problems and adaptive challenges, which *broadly* speaking map onto the ideas of complicated versus complex.

In the table on page 11, we have tried to set out some of the differences between different types of problems. As you practise noticing the nature of problems you are facing, you will become clearer – and with practices and approaches for tackling both tame and wicked problems, you will become more confident at avoiding Heifetz's warning about leadership failure.

> **"The most common leadership failure stems from attempting to apply technical solutions to adaptive challenges"**
>
> RONALD HEIFETZ – HBR 2009
> IMMUNITY TO CHANGE

IF WE TRY TO IMPOSE MECHANISTIC, STRUCTURAL SOLUTIONS TO CREATE ORDER, WE CREATE UNWARRANTED BUREAUCRACY.

'Wicked Problems' are so named because they have no simple solution. The common features of a wicked problem are:

They are either novel or recalcitrant	They have symptoms of deep divisions – they are inherently contested
They are complex rather than just complicated (ie, they cannot be solved in isolation)	There are no right or wrong solutions, only better or worse developments
They are embedded in other problems – their 'solution' often generates another problem	Securing the 'right' answer is not as important as securing collective consent
They often have a no stopping rule – thus there can be no clear definition of success	They are about feasibility, not optimality; coping rather than solving
They may be intransigent - problems that we have to learn to live with	They are problems for leadership, not management; they require collaborative, not authoritarian, processes.

[5] See: Keith Grint,2008: *Wicked Problems and Clumsy Solutions: the role of Leadership:* the British Association of Medical Managers, Petersgate House. Available at: http://leadershipforchange.org.uk/wp-content/uploads/Keith-Grint-Wicked-Problems-handout.pdf

[6] For a summary and further references, see: pp171-173 of *The Art of Change-Making*, Leadership Centre 2015

Reflection Questions

- Are these concepts helpful in deepening your understanding of the systems leadership challenges you are facing? If so, how? In not, why?
- Are there aspects of concepts that you would like to clarify or explore further?
- Are there any ways in which you would like to challenge these concepts?

TAME – 'MANAGEMENT'	WICKED – 'LEADERSHIP'	CRITICAL – 'COMMAND'
Resolvable through unilinear acts Limited degree of uncertainty Application of appropriate processes	Complex rather than complicated Cannot be removed from its environment, solved & returned without effect on its environment No clear relationship between cause and effect No clear 'solution' Requires collective engagement	Commander provides the answer Calls for decisiveness Little or no uncertainty
Timetabling railways Building a nuclear plant Planned heart surgery	Developing and sustaining a national health service Tackling the obesity epidemic	Critical incident response Responding to a major incident

Adapted from 'Wicked problems and clumsy solutions: the role of leadership', Keith Grint, Clinical Leader, *Vol I Number II, Dec 2008*

DEEPENING YOUR DIAGNOSIS: TAME/WICKED/ CRITICAL PROBLEMS

Map the elements of your systems leadership challenge under the headings 'Tame', 'Wicked' and 'Critical'.

For each of these elements reflect on whether you have offered 'management', 'leadership' or 'command'.

- What does this tell you about the nature of the challenge you face? Is it a wicked challenge?
- What does this tell you about how you might deploy 'management', 'leadership' and 'command' in the future?

ON WAYS OF DIAGNOSING YOUR SYSTEM

In this section, we looks at approaches for diagnosing what is going on in your system/ systems leadership challenge.

The range of approaches we cover in the programme and in this workbook aim to enable you to think differently and have different conversations with other people. Some are designed to access different parts of your brain, to enable you to notice, and perhaps break free from, what might prove to be unhelpful thinking shortcuts or frames.

a

Rich pictures

Using a 'rich picture' is a way of depicting a complex situation in a visual form.

The ideas behind rich pictures come from Soft System methodology and the work of Peter Checkland from the University of Lancaster[7].

The aim with using rich pictures is to surface your perception or impression of a situation that you are facing in a visual and holistic way. Rich pictures depict the primary actors in a situation, their interrelationships and their concerns.

Your rich picture will illustrate your broad, 'high-grain' representation of a situation and in conversation with others, it will allow for different perspectives to be shared and the possibility of new interpretations and insights.

There is no single best way of drawing rich pictures. Everyone's perspective and approach will be different. There are lots of ways of sketching a good rich picture and very few ways of sketching a bad one.

Finally, include yourself in the picture. Make sure that your roles and relationships in the situation are clear. Remember that you are not an objective observer, but someone with a set of values, beliefs and norms that colour your perceptions.

[7] See: http://systems.open.ac.uk/materials/T552/pages/rich/rp-what-script.html

Guidelines

1 A rich picture is an attempt to assemble everything that might be relevant to a complex situation - it is never complete and is just a snapshot in time.

2 To help interpret a situation, choose symbols, scenes or images that represent the situation as you see it. Use as many colours as necessary and draw the symbols on a large piece of paper - use the whole page. You do not need to be an artist (and it probably helps if you are not!).

3 Put in whatever connections you see between your pictorial symbols: avoid producing merely an unconnected set. Places where connections are lacking may later prove significant.

4 Avoid too much writing, although 'word bubbles' coming from people's mouths may help - only if you use their words, though, not your interpretation!

5 You should not seek to impose any style or structure on your picture. Place the elements on your sheet wherever your instinct prompts. At a later stage you may find that the placement itself has a message for you.

6 If you 'don't know where to begin', then the following sequence may help to get you started:

- a first look for the elements of structure and key actors/roles in the situation (e.g. the people, the set-ups, the command hierarchy) and draw these;
- b next, look for elements of process and interrelationships within the situation (the activities, social roles and quality of interactions that are going on) and draw these;
- c if you see any tensions or conflicts between the key actors or the way that structures and the processes interact, then indicate these. Likewise, show where things are working well. You may want to use symbols, like forked lightning or sunshine. Doing this will give you an idea of the climate of the situation;
- d make sure that your picture includes not only the factual data about the situation, but also the subjective information. Thought bubbles can also give a sense of some of the issues/concerns that key players are carrying

Some questions to ask yourself when drawing your rich picture:

- Does this rich picture represent the situation as holistically as possible or is it just my interpretation of what the problem is?
- Is this rich picture telling just one story or is it rich enough to suggest lots of stories about what's going on?
- Have I included everything I know about the situation in my representation of it?

Some questions for reflection

- What strikes you immediately?
- What stands out the most? What colour is the strongest and what might this be saying?
- Anything different, new or missing?
- Any new insights about this complex situation and how to handle it?

b

Creating an Actor Map

An Actor Map can be described as a form of stakeholder mapping. It has its roots in social movement theory[8], which by definition is about bringing about social change through social movements – i.e. where there is often very little formal authority that can be enacted. As such, it can be really helpful for people working in SEND who are trying to bring about change when they don't have formal or positional authority.

An Actor Map is an analysis of the people, communities and agencies who are connected to a particular problem or change challenge. It is an analysis of whether they share or oppose the underpinning values of the change challenge, and asks you to identify the nature of their active engagement (or otherwise) with actually doing something.

The map looks like the diagram on p17.

To complete an Actor Map, you might like to start with a set of post-it notes (or similar), writing the names of the people, groups, communities and agencies involved (or who you believe ought to be involved).

Then, working through each one by one, ask yourself:

- Does this person, group etc share the underpinning values that call us to seek this change?
- If your answer is "no", place them in the 'opposition' section
- If the answer is "yes", are they active in some way in seeking change on this issue? If so, place them in the 'constituency' section; unless they are active in engaging and organising others to join in with the change activity, or connecting them with others seeking to do so. In that case, they should be placed in the 'leadership' section within the 'constituency'
- If they are not currently active, (but share the underpinning values) they are either 'supporters' or 'competition'. If they are in competition in some way for the energies or resources that you are hoping to capture for your issue, they are probably best placed in the 'competitor' section.

You might find, as you complete the mapping, that groups or organisations are too diverse to place in one part of the map – in that case, try and 'chunk down' into sub-groups or individuals.

You might find that you really don't know where people are in relation to their values or their activities – you might then decide to try and connect with them to find out, and maybe bring them into your endeavours. Look at the section in this workbook on Intentional Relationship building and one-to-ones for a possible approach.

[8] For an introduction to social movement theory and the work of Marshall Ganz, see pp 51-53 of *The Art of Change-Making*, Leadership Centre 2015

When you have got a more or less completed map (it will never be truly finished, as there will be continual movement), you can think about where you want to focus your efforts. Who do you want to try and influence to 'move' from one category to another? What would be most helpful or influential? Where would it be best to focus your efforts (NB it may not be with opposers).

Constituency

Systems leaders transform a community into a constituency. A community shares values or interests. A constituency is a community organised to use its resources to act on those interests (from the Latin for standing together).

A constituency is different from a client or a customer. Clients (from the Latin for "one who leans on another") have an interest in services others provide. Customers (a term derived from trade) have an interest in a good a seller can provide in exchange for a cash resource.

Constituents are the heart of organisations that serve them. Clients and Customers are usually external to these organisations. Constituents can become "members" of the organisation just as citizens become "members" of a democracy. Voters are constituents of an elected official. Workers employed by particular employers may be constituents of a union. People with environmental concerns may become the constituents of environmental organisations.

Economist Albert Hirschman described three alternative responses to the need for change in a system: exit, voice, and loyalty. Constituents can influence the system through voice: making themselves heard through internal means. Customers and clients can only assert influence through exit, taking their resources elsewhere.

The systems leader's job is to turn a community – people who share common values or interests – into a constituency – people who can act on behalf of those values or interests.

Systems leaders assume that people are not mere objects of social forces that "cause" them to do things, but are, in fact, agents of change or actors. As actors, we remember, imagine, choose, and reflect on choices. Although social forces influence our choices, our choices also shape social forces. Because we are not atomised individuals, floating in space, we exercise agency interdependently with others whose decisions affect our own. Can we understand the "drugs problem", for example, without taking into consideration the myriad dealers, smugglers, and producers who mobilise to frustrate every attempt to solve it?

Leadership

Although your constituency is the focus of your work, your goal as a systems leader is identify, recruit and develop leadership from within that constituency – initially, a leadership team – who will organise everyone else. Their work, like your own, is to "accept responsibility for enabling others to achieve purpose in the face of uncertainty." They facilitate the work members of their constituency must do to achieve their goals, represent their constituency to others, and are accountable to their constituency.

Leaders of large – or small – bureaucratic organisations may have little relationship with clients or customers. Leaders of civic associations, on the other hand, can only earn leadership through relationships with their constituents - club officers, union stewards, members of a parish council, etc.

Full-time or part-time people who do the day-to-day work of the organisation may also serve as leaders, whether volunteer or paid, even if not drawn from the constituency if they are accountable to it – e.g. full time local union presidents, chairs of mission committees, and the people who pass out leaflets on behalf of a candidate. Most organisations have a governing body that decides policy, chooses staff, and may or may not be involved in day-to-day activities. In bureaucratic organisations, the governing body may be self-selected, selected by outside groups, or by donors or investors - but rarely include leaders drawn from among their clients.

Opposition

In pursuing their interests, constituents may find themselves to be in conflict with interests of other individuals or organisations. An employer's interest in maximising profit, for example, may conflict with an employee's interest in earning a living wage. A tobacco company's interests may conflict not only with those of anti-smoking groups, but of the public in general. A street gang's interests may conflict with those of a church youth group. The interests of a Republican Congressional candidate in the USA may conflict with those of the Democrat candidate in the same district. At times, however, opposition may not be immediately obvious, emerging clearly only in the course of a campaign.

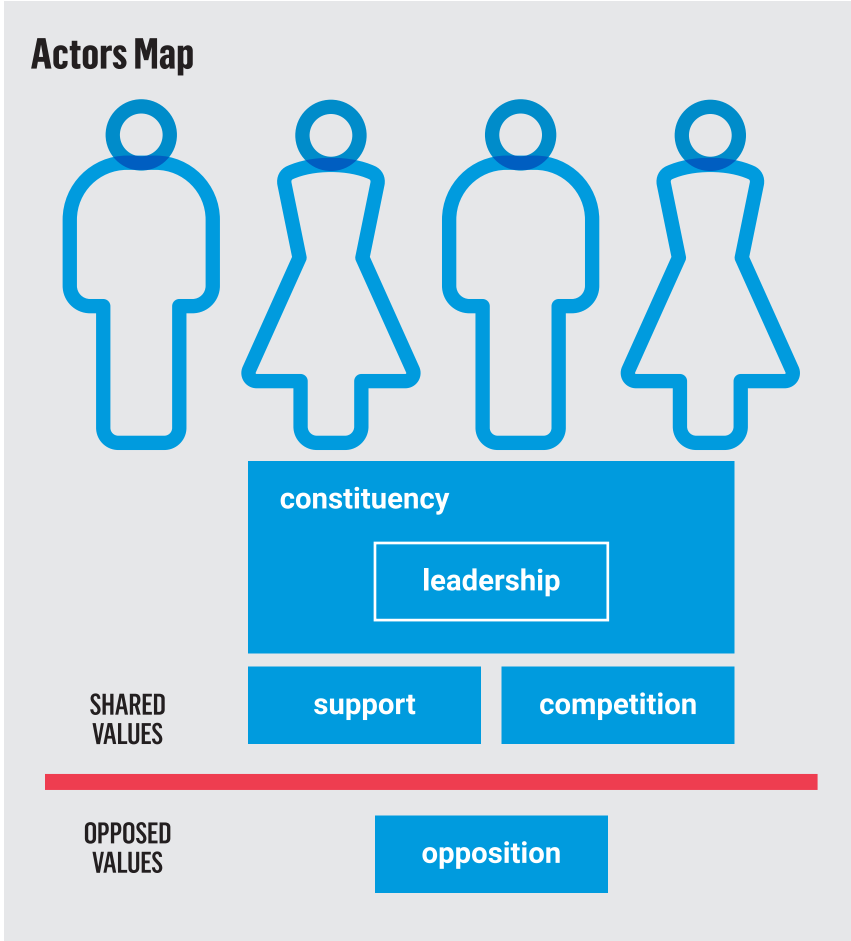
Supporters

People whose interests are not directly or obviously affected may find it to be in their interest to back an organisation's work financially, politically, voluntarily, etc. Although they may not be part of the constituency, they may sit on governing boards. For example, Church organisations and foundations provided a great deal of support for the civil rights movement in the USA.

These are individuals or organisations with which we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. Two unions trying to organise the same workforce may compete or collaborate. Two community groups trying to serve the same constituency may compete or collaborate in their fundraising.

Competitors and Collaborators

These are individuals or organisations with which we may share some interests, but not others. They may target the same constituency, the same sources of support, or face the same opposition. Two unions trying to organise the same workforce may compete or collaborate. Two community groups trying to serve the same constituency may compete or collaborate in their fundraising.



ON NARRATIVE

As we saw on the programme, and illustrated using the (Heider and Simmel research[9]) video graphic, humans are sense-making and story telling creatures. We have a need to make sense of what we see, and frequently use stories and narratives to do so. You will remember how we saw a tendency to assign emotions, intentions, morality to two triangles, a circle and some lines in the space of less than two minutes.

This has a number of significant implications for us as leaders. Firstly, if we do not own our own narratives, about who we are and what we are trying to do in the world as leaders, others will apply their own meaning to it – just as we did in watching the video.

Secondly, in owning and using narratives we have a powerful leadership skill and set of approaches to mobilise and influence others, to show others our values and our purpose, and to connect with them on those deeper levels.

The next section offers a reminder of the Public Narrative work we covered, based on the work of **Marshall Ganz**[10] from Harvard University. This is not intended to be a complete set of notes – rather an aide memoire of the session, and a summary of the key points to bear in mind as you continue to develop your leadership practice using Public Narrative.

Public Narrative is...

Source: Professor Marshall Ganz, Harvard Kennedy School

[9] For the research, see, for example: http://www.psychologyconcepts.com/heider-and-simmel-study-of-apparent-behavior/.
For the graphic, see: https://www.youtube.com/watch?v=76p64j3H1Ng

[10] For an introduction to Public Narrative and the work of Marshall Ganz, see pp 174-176 of *The Art of Change-Making*, Leadership Centre 2015

a

Public Narrative

Introduction to Public Narrative

Public Narrative was developed by Marshall Ganz at Harvard University.

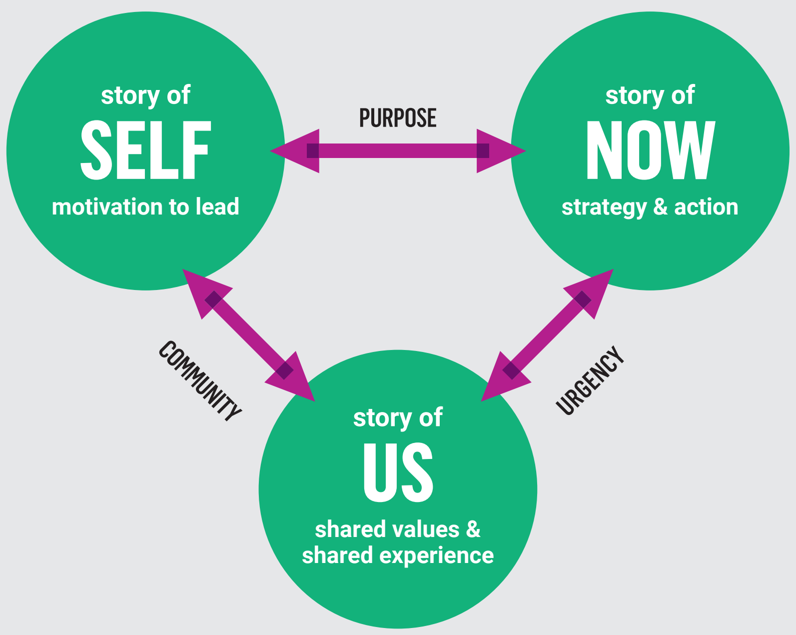
Public Narrative is a leadership skill; not a script, a speech or a presentation. It is a way of mobilising people to join you in taking action. It connects with people at the level of values; of what matters to you and to others. It is purposeful – it is about a specific challenge, or set of challenges. A Public Narrative asks people to take a specific action; a credible, feasible and immediate next step.

Public Narrative is made up of three linked stories: of self, us and now. It is purposeful, it creates urgency and it forms a community of people who care, who will join together and who will take action.

It is useful to us as leaders because we do not always have authority to compel others to act. But more than that, we want and need to connect with people's hearts and minds in order to develop the sort of shared endeavour that complex, wicked problems require.

Leadership in this sense is truly collaborative.

Thinking back to the concepts of wicked issues and complex problems, and the 'blue box, yellow circle' diagram; we know that these issues are often contested. People have differing and conflicting views about the nature of the problem and what needs to happen to solve it. We also know that we CANNOT know what will work in a complex problem – we need to learn our way into a shared solution with others.



Source: Professor Marshall Ganz, Harvard Kennedy School

Public Narrative is purposeful

Get as clear as you can about:

What is the challenge or issue around which you want to mobilise people?

Who it is you want to engage to join you though your Public Narrative?

What do you know currently about what they think about the issue?

What is the credible, feasible action or step you are going to ask people to take?

What are the underlying values that you believe you and others share, that are being contravened? E.g. equality – ALL learners deserve equally great educational opportunities

What makes a story?

A story has characters. Those characters are you, and those who you want to join with you, and those that the challenge is affecting – both now and potentially in the future.

In a story, something happens – there is a plot.

Invariably, the characters face a challenge, and in the face of that challenge there is a choice to be made. What to do? We then make a choice. As a result of that choice there is an outcome.

What makes a good story great?

A great story has 'advance' as we have tried to set out above. We lean in, wanting to know what happens next. It creates a sense of urgency. We feel its purpose.

A great story also has great detail. We can see and hear what is going on in our mind's eye. We are drawn in by the sensations described. The details of people, places, rooms – sights, sounds, smells.

Through both 'advance' and 'sensation' the story connects with our head and our heart; with our logic and our emotions. We are faced with a choice in terms of how we respond.

b

Story of Self, Us and Now

Story of Self

You will have many, many stories that could be developed into Stories of Self. You might not believe that right now, but the more you look for, develop and use your stories, the more you will find more of them. A story of self is a story about you that shows us why you are motivated to lead on this particular issue or challenge. There is no one single story of self that will meet all your narrative needs.

Stories of self can be from your formative years, or from today. They could be huge, life-changing events or small but significant moments.

A story of self is not your CV, it is not your life story, or your professional journey to here.

A story of self **shows** us why you are motivated to lead, rather than tells us why you care.

In the programme, we watched a video of Julia Morrison telling a story of self. She told two very personal stories that showed us why she is motivated to reach out to people who are struggling and offer help and support through talking.

Her story both of her Nan and of her own experience of walking away from a role that she loved, showed us her motivation in powerful, stark and emotive terms.

The detail of places, people, moments in time were evocative and memorable. We were there with her; we saw and felt Julia's values and connected with them as people.

What is the issue in relation to which you want people to join you in action?

What is a story about you that shows why you care about that issue?

What was the challenge you faced in that story?

What choice did you make?

What was the outcome of making that choice?

What is the moral of that story that you want to illustrate?

How can you make it a great story through 'advance' and 'sensation'?

Story of Us

The story of us in Public Narrative is a story of why 'we' are called to action. It is the story that mobilises people to join us, because they share the values that underpin the challenge that we are presenting to them, and share the sorts of experiences that allow 'us' to share together in that sense of urgency and purpose.

In the video of Rita, from Made in Dagenham, we saw how Rita connected with an audience of her 'opposition' with stories of shared values from wartime experiences and from being members of the working classes "the men AND the women".

Rita connects everyone together and shows how our shared values ("you gotta do what's right, that's a given") were being contravened by what was happening.

Who are the people you want to join your "us"?

What are the experiences, past and present, that you share with them that enable us to really understand the nature of the challenge, the nightmare that we will see if we fail to act?

What are the values that we share that are being contravened?

What is the choice that we are facing? To act or not to act?

Story of Now

The story of now is the story of the challenge we face. It sets out succinctly what the issue is, in clear and evocative terms. It tells a story of the nightmare we will face (or continue to face) if we fail to act. But it also, importantly, sets out a hopeful vision – a plausible, better future that could feasibly come to pass if we make the choice to act. And vitally, the story of now sets out the action you want people to take. A credible next step towards that future.

What is the urgent challenge you want us to face?

What is the nightmare scenario if we fail to act effectively?

What is the hopeful ambition if we take action together?

What is the specific credible next step or action you want us to choose to take?

Developing your own Public Narrative

Public Narrative is a practice skill. It can become part of your leadership practice, in full or in part.

Use the questions in the boxes above to think through each element of the three stories and how you might link them together.

Getting feedback on your narrative as you are developing it can be really helpful. Finding out from others what resonated, what emotions people felt, and what would have made it even stronger can be really helpful in learning and iterating.

Ask for feedback on:

What emotions did you feel?

What values were evoked?

Sensations – visual imagery, sights, sounds, smells etc – what worked, what would make it even better?

Were the three stories clear? Story of self, story of us, story of now? What worked, what would make it even better?

Was the ask/action clear. Did it feel feasible, credible, hopeful?

You are aiming for no more than four or five minutes for a full Public Narrative. Less is more if you want to 'hold' your audience. You might want to deliver a Public Narrative in a formal setting, meeting or function. But they can be more informally used, to open a small discussion, re-set the tone in a one-to-one etc.

BUILDING INTENTIONAL RELATIONSHIPS

Relational skills are at the heart of great leadership, when we are working with complex problems in a living system.

Why do we build relationships?

In a commitment-based approach to leadership, we cannot count on the incentives that we would usually find in a compliance model, such as formal hierarchical power or money. Commitment is the glue of our work.

A central insight from the world of organising is that **commitment is developed and sustained through relationships**, which must be constantly and explicitly developed and nurtured.

We all have busy lives and competing priorities – different projects, children who need to be cared for, sports or other activities that we like to engage in. In a call to action, when the going gets rough, when we face scepticism from colleagues or when we are asked to do difficult things, often a commitment to the cause isn't enough.

Unless we know that someone is counting on us and supporting us, we may well give priority to other things – the shopping our partner asked us to do, the presentation our boss asked us to review.

That's why relationships are key to holding the call to action together. We can be committed to a cause, but a cause cannot help us or hold us accountable. When we build relationships, we aren't just doing the work for the cause; we're also doing it because we're in it with others.

But leadership is also **about *enabling* others to achieve purpose**. The foundation of this approach to leadership is the quality and intent of the relationships built with others, especially with others with whom we can share leadership.

Through relationships, we **build capacity** at three levels:

A source of leadership – Identifying, recruiting and developing leaders

1

We build relationships with potential allies to explore values, learn about resources, discern common purpose and find others with whom leadership responsibility can be shared.

A source of purpose – Building community

2

Leaders, in turn, continually reach out to others, form relationships with them, expand the circle of support, and grow more resources that they can access and recruit people who, in turn, become more confident leaders themselves.

Relationships are built with allies, but they should also be built with competitors who share the same values as us.

A source of power – Mobilising community resources

3

Relationship building does not end when action starts. Commitment is one of our greatest resources, particularly when a call to action encounters competition, internal conflict or external obstacles. The more that people find purpose in the group or structure you are building, the more they will commit resources that you may never have known they had.

What are relationships?

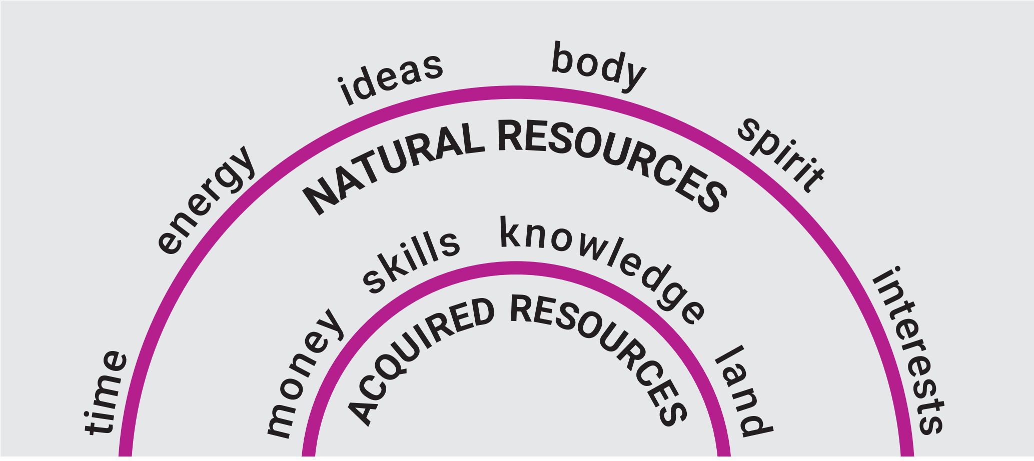
Relationships are rooted in shared values and in shared purpose

We can identify values that we share by learning from each other's stories, especially 'choice points' in a life journey.

The key is asking 'why?'

Relationships grow out of exchanges of interests and resources

- Your resources can address my interests
- My resources can address your interests



The key is identifying interests (e.g. understanding, support, money) and resources (e.g. information, insight, work).

This means that relationships are driven as much by difference as by commonality.

Our common interest may be as narrow as supporting each other in pursuit of our individual interests, providing they are not in conflict, but relationships in calls to action are not simply transactional. We are not simply looking for someone to meet our 'ask' at the end of a one-to-one meeting. We are looking for leaders to join with us in long-term relationships of learning, growth and action.

Relationships are created by commitment

Relationships in a call to action go beyond an exchange or an "extraction" of resources to satisfy my interests. *An exchange becomes a relationship only when each party commits a portion of their most valuable resource to it: time.* A commitment of time to the relationship gives it a future and, therefore, a past.

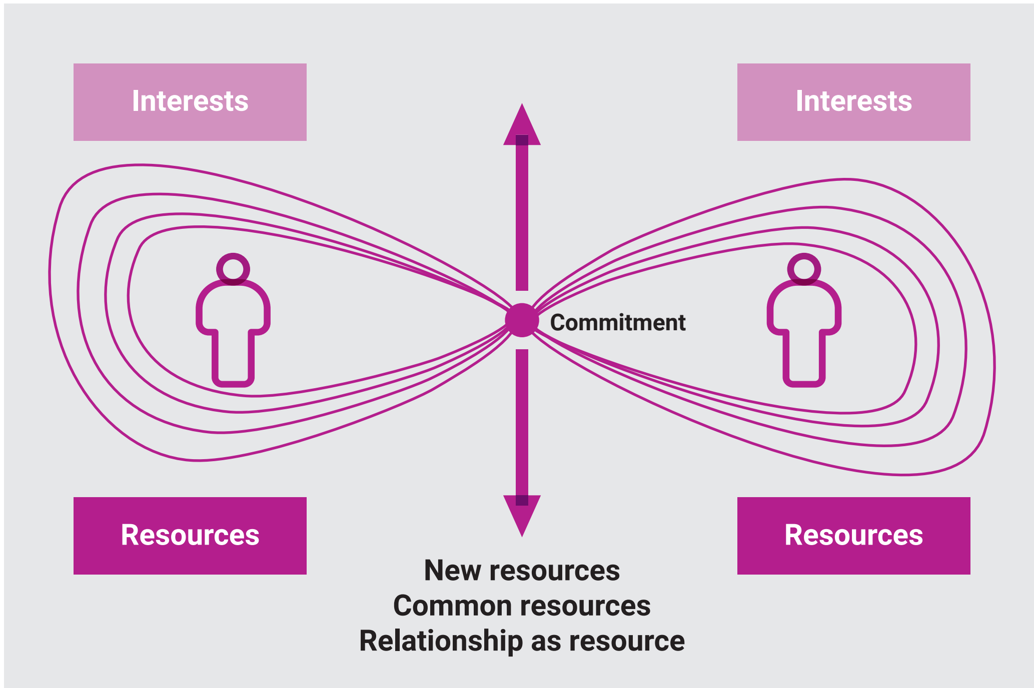
Relationships are shared learning and growth

Like any human relationship, organising relationships involve constant attention and work to flourish. When nurtured over time, relationships become an important source of continual learning and development for the individuals and communities that make up your call to action.

Relationships can *redefine interests* – people acquire new individual interests and understandings or discover/ construct new common interests.

Relationships can also *redefine resources* – as people acquire new capacities, individuals may gain access to each other's resources or they may facilitate the development of common resources (e.g. through co-coaching).

As we all learn, grow and change, the purpose that led us to form the relationship may change as well, offering possibilities for enriched exchange. In fact, *the relationship itself may become a valued resource and/or interest* – what Robert Putnam calls 'social capital'. We bring our identities to the relationship – as people become part of new communities, relationships redefine identities or social roles and shared identities can emerge (a new "story of us").



How do we build intentional relationships?

One-to-one conversations

This is a technique for building intentional relationships that has been developed and refined in the world of community organising over many years.

One-to-ones are good for identifying leaders and recruiting them to the call to action, but regular one-to-ones are also critical for building and sustaining strong relationships in which both partners grow and learn together over time. We use every opportunity to build and deepen relationships, particularly in team or organisational meetings.

A one-to-one meeting consists of five steps:

Step one – attention and selection

Once we've strategically decided who we want to speak to, we have to attract another person's attention to conduct a one-to-one meeting. Don't be coy – be as up-front as you can be about what your interest is in the meeting.

Step two – purpose

There must be a purpose or a goal in setting up a one-to-one meeting. It could range from, "I'm starting a new call to action and thought you might be interested" to "I'm struggling with a problem and I think you could help" or "I know you have an interest in X so I'd like to discuss that with you."

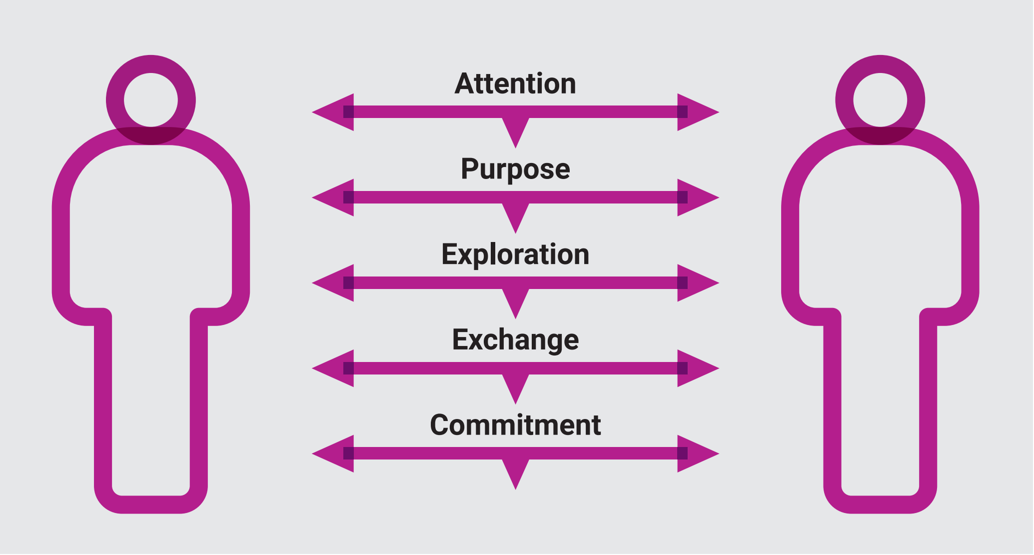
Step three – exploration

Most of the one-to-one is devoted to exploration by asking probing questions to learn about the other person's values, interests and resources and by sharing enough of your own values, interests and resources that it can be a two-way street.

Explain why the work you are asking them to engage in is important (build on your story of self, us and now). Be specific about the challenges we face, but also the opportunities and hopes. Instead of making statements, ask questions that help the person locate their own sense of anger and hope around the challenge.

Step four – exchange

We explore our individual resources such as information, support and insight and how we can bring those resources to bear in this relationship and on behalf of the call to action. An exchange of resources could be anything from identifying professional contacts to the skills, time and motivation of friends and family. This creates the foundation for future exchanges.



Step five – commitment

Towards the end of a one-to-one, both parties have a choice to make: whether or not to move forward with this relationship and to commit to further exchanges of interests and resources. It may be that through the one-to-one you have discovered there is no basis for an ongoing relationship – in which case there will be no ongoing commitment.

However, if you choose to continue building a relationship, a successful one-to-one ends with a clear commitment, most likely to meet again and to engage in action together. By scheduling a specific time for this meeting or action together, you make it a real commitment. The goal of the one-to-one is not so much to get someone to make a pledge to join your call to action as it is to commit to continuing the relationship in service to a shared purpose and desire for change.

DO

- Schedule a time to have this conversation (usually 30 to 60 minutes)
- Plan to listen
- Follow the steps of the conversation above
- Share experiences and deep motivations
- Share a vision that articulates a shared set of interests for change

DON'T

- Be unclear about purpose and length of the conversation
- Try to persuade rather than listen
- Chit chat about private interests
- Skip stories to get to the point
- Miss the opportunity to share ideas about how things can change

Relationships and hierarchy

In calls to action, we work hard to ensure a level of mutuality and transparency that can be uncommon in traditional hierarchical relationships. It may, therefore, require us to redefine relationships with people with whom we have previously worked as managerial superiors or subordinates or in a hierarchical clinician/patient relationship.

For example, in a stereotypical patient/clinician relationship, the patient is a receiver/consumer of care. The healthcare professional leads the process and defines the problem and the intervention. The interaction is largely transactional rather than mutual. Now imagine a relationship in which the patient becomes a co-creator of the care. The process is collaborative and the intervention is generated jointly by the patient and the professional; they agree on a healthcare plan which engages not only the patient, but commits both the patient and the professional.

Imagine that you need authorisation from a senior leader in your organisation to conduct activities on behalf of your call to action. Rather than submitting a formal memo asking for what you need, imagine having a one-to-one with that person. How would it be different from a typical interaction with a superior?

When building a relationship, you are not simply asking them for a particular resource, you are also offering them an opportunity to act on their values and become part of the call to action. Your interest in their particular resource is only the start of your conversation.

Through your one-to-one, you are giving context for your call to action and exploring why they would want to be part of it. Then you are exploring whether they have other interests, knowledge or resources that could be useful to your call to action or which your call to action could address. Are they interested in identifying potential leaders for another improvement project? This could be an opportunity to address that goal as well.

You may want to ask them to conduct one-to-ones with other senior leaders or to develop their public narrative and deliver it at your next event – and you could support and coach them in doing so.

A final example comes from the current call to action on dementia and antipsychotics. In this call to action, pharmacists are asked to commit to work in partnership with healthcare colleagues to review the medication of each individual with dementia under their care who is prescribed antipsychotics. Coming good on this commitment is likely to involve a pharmacist asking a GP to conduct a review of medication.

Under normal circumstances, the relationship between a pharmacist and a GP is conducted within an implicit professional hierarchy, with the GP holding the clinical authority to review their patient's prescription. By asking for a review, the pharmacist is potentially challenging that authority and may create a conflict that is personally and professionally difficult and which may not result in the desired outcome.

But what if the request for a review comes as the end of a one-to-one – or more likely, a series of one-to-ones - in which the pharmacist and the GP have identified and shared the values that brought them into the NHS? What if the pharmacist frames these conversations as an opportunity to for the GP to join with others in a call to action?

Using the relational framework of a one-to-one doesn't make the challenges of developing intentional relationships within hierarchy or the potential for conflict disappear. However, we believe that by connecting with each other as human beings, at the level of values, before tackling the conflict issue, the playing field can be levelled and people of goodwill can be mobilised to act beyond narrow personal or professional interests.

Sustaining relationships over time

If we understand commitment to be the glue that binds our call to action and relationships to be the means by which we build commitment, then consistently and intentionally developing relationships over time becomes a central task of leadership.

A one-to-one meeting is a tool for developing relationships over time – not a sales pitch. It can be used very effectively as a tactic for recruitment – spotting someone with resources or leadership potential whom you would like to join you in your action. But what happens next? How strong is a relationship based on a single one-to-one? How strong is the commitment? The steps of a one-to-one provide a framework for building relational commitment throughout a call to action: before and after call to action 'peaks'; at leadership team meetings; with close allies and with distant competitors.

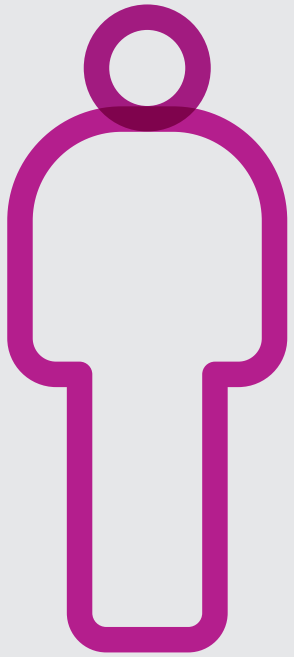
HAVING A RELATIONAL ONE-TO-ONE WORKSHEET

The goal is to explore why your partner has been called to do this work. Probe with "why?" questions to get to choice points and specific experiences that shaped his/her life. Share your story. Listen to your partner's story for the motivations and the resources he/she brings to the course (leadership skills, a following, action skills, etc.). Be specific.

Avoid talking about issues like 'systems leadership' in an abstract and detached way — talk about why YOU both care about this work and the current places you are involved with, because of your own life experiences or the specific experiences of people you care about.

What values were you taught that make you care about this? How were you taught those values? Make sure not to forget the most important part of a one-to-one, the commitment. Try to reach a commitment on how you can support each other during the programme and beyond.

Use the worksheet below to inspire conversation if you get stuck!



Story

What's your family story?

What in your life brought you here today?

Leadership qualities

What skills do have?

How do you lead others already in your life?

What would you be willing to bring to this movement?

Hope

What motivates you to act to organise others?

What's your vision of how things could be different if we work together?

Challenges

What keeps you from action?

What do you fear?

What would you want to learn?

What values do we share?

What interests can we act on together?

What skills and resources do we each bring to this work?

When will we meet or speak again to take action and to keep building this relationship?

SHARED VALUES, INTERESTS, SKILLS AND RESOURCES WORKSHEET

When you have finished your one-to-ones, take note of your shared interests, values, skills and resources.

Common values & interests	Skills & resources

CHOOSING AN APPROPRIATE INFLUENCING STYLE[11]

[11] Originally adapted from work by Roger Harrison and the Office for Public Management (now Traverse): see, for example http://www.gilsmodel.com/index.php?id=34

Introduction

One key to successful influencing is the selection of an influencing style that is appropriate to the situation. Three steps will help you make this selection.

1 Clarify your influencing objective

different objectives require different styles. For example, in dealing with a subordinate, a manager's objective might be to teach, appraise, console, or motivate. Each objective would require a different influence style or combination of styles.

2 Analyse critical factors in the situation

various external factors support or detract from the effectiveness of each influence style. A style that would be optimal under one set of conditions may become less effective if those conditions change.

3 Assess your skill level

although the use of a certain influence style might be indicated by a specific influence objective and situational factors, you may lack confidence in your ability to use that style. You might decide to use a more familiar style, even though it may be less appropriate.

Conditions that support persuading

- **The other person respects your competence**. You are recognised as an expert or authority in the area under discussion; as having unique experience that is important to the outcome of the current problem; and as holding an established record of success in dealing with this particular kind of situation. Others have looked to you for advice and counsel on this kind of problem in the past.
- **You have significant exclusive information**. You know something that others do not know; the facts and insights at your disposal are new to the people involved; you have data and resources to solve the problem that others are unable to acquire.
- **Alternative positions can be tested by facts and reason**. A logical or more reasonable solution to the problem exists; alternative positions or viewpoints can be objectively tested in the real world.
- **People are relatively unemotional, or are in control of their emotions**. Neither you nor your "influence target" is anxious, threatened, angry, or fearful. Even if the situation is somewhat tense or stressful, everyone is capable of remaining calm and willing to work at problem solving.
- **You are perceived as objective, not as competitive**. Others do not see you as biased or as having a vested interest in the outcome; you are not perceived by others as an adversary.

Conditions that support asserting

- **Both parties have a personal stake** – something to gain or lose. Your needs are important enough that you are willing to invest considerable energy and take the personal risks inherent in asserting, for example, that if your approach fails it is your responsibility; the other person has acknowledged, or can be brought to recognise, his or her own vested interests.
- **You have legitimate needs, requirements, or expectations**. Custom, tradition, or culture make some issues appropriate to assert or negotiate, and may offer the opportunity to appeal to professionalism, duty or fair play.
- **You can use incentives and pressures that you personally control**. You have the means or resources to affect the other person's contribution or emotional or intellectual energy; the situation does not require more from the other person than to follow clear directions; you are willing to expend the energy required to monitor performance.
- **The other's need to control is low to moderate**. The other person is not the type of personality that needs to be in charge, nor feels so intensely about this issue that he or she will automatically resist any demand or expectation.

Conditions that support bridging

- **The other person's contribution might be helpful to you**. You believe that the other's insights and participation will have a positive impact on the results; the involvement and input of others is necessary to accomplish the task at hand; and you do not have the energy or expertise to accomplish the task alone.
- **The other person must be committed to the outcome**. You depend on the other's ability to carry out the agreement creatively and with high personal investment; the solution requires that the talents and resources of others be fully utilised; and the solution will be carried out or implemented by others in your absence.
- **You are open to influence – a final decision has not been made**. You are less concerned with the means than the ends; you are willing to consider alternative points of view about the objective or how it can be met; and you are open to the other person's participation in redefining the objective or in specifying the next steps that should be taken.
- **The other person will not lose something by working with you**. The person does not see his or her participation with you as a threat to other important relationships. (For example, status or trust would not be lost with important peers or bosses, and you are not asking for disloyalty to others).
- **Others are upset or emotionally stressed**. The other person is blocked from responding to your influence because of some emotional state; the other person's emotion or anger is directed at you, personally; the situation is one of great stress and personal concern for the individual(s) you want to influence.

Conditions that support attracting

- **You and the other person(s) have common values, goals, and aspirations**. You share similar backgrounds, professions, or personal history; the other person has values, goals, or aspirations similar to yours; and you are aware that you both seek the same ends even if through different means.
- **The other person trusts and admires you**. You have earned the respect of the other through past interactions; and you have a reputation for being honest and trustworthy.
- **The other person is unsure or directionless**. Circumstances have created low morale or insecurity; the other person is under stress and cannot resolve the confusion he or she is in; and they need/want leadership.
- **The situation triggers important hopes, fears, or values**. There is a sense of emergency or impending trouble; a valued idea, system or community is threatened; an opportunity has already emerged; situational conditions are in flux or in a state of change; pessimism and negativity are blocking action.
- **Generating energy or a sense of purpose is more important than getting others to take a specific action**. You need people to be empowered, setting a course and aligning with you; a cooperative effort will ensure a positive outcome; there is a high priority on concerted action; and long-term results are more important than short-term action.

DIAGNOSTIC CHECKLIST

Style	Situational conditions	Condition is met (+), not met (-), not sure (?) Circle critical conditions	Most effective style? Ranking 1= highest, 4= lowest
Persuading	1 The other person respects your competence. 2 You have significant exclusive information. 3 Alternative positions can be tested by facts and reason. 4 People are relatively unemotional, or are in control of their emotions. 5 You are perceived as objective, not as competitive.		
Asserting	1 Both parties have a personal stake – something to gain or lose. 2 You have legitimate needs, requirements, or expectations. 3 You can use incentives and pressure that you personally control. 4 Compliance is sufficient; you do not require commitment. 5 The other person's need to control is low to moderate.		
Bridging	1 The other person's contribution might be helpful to you. 2 The other person must be committed to the outcome. 3 You are open to influence – a final decision has not been made. 4 The other person will not lose something by working with you. 5 Others are upset or emotionally stressed.		
Attracting	1 You and the other person share common values, goals, and aspirations. 2 The other person trusts and admires you. 3 The other person is unsure or directionless. 4 The situation triggers important hopes, fears or values. 5 Generating energy or a sense of purpose is more important than getting others to take a specific action.		

GETTING INTO OTHER PEOPLE'S SHOES

Who do you want to influence?	
What do you want to influence them about?	
What do they think of you?	
Why do they think the way they do?	
What do they want from you?	
What do they REALLY want from you?	
What new insights have you had by getting into their shoes?	

OTHER RESOURCES YOU MIGHT FIND INTERESTING

Atkinson, Loftus & Jarvis (2015); The Art of Change Making

Available at
https://www.leadershipcentre.org.uk/wp-content/uploads/2016/02/The-Art-of-Change-Making.pdf

Chapman, Jake (2002); System Failure, Why governments must learn to think differently, Second Edition

Available at
https://www.demos.co.uk/files/systemfailure2.pdf

Checkland & Scholes (1999); Soft Systems Methodology: a 30-year retrospection; John Wiley & Sons; New Ed edition

Ellis, Karen; Grace under Fire – building resilience

Available at
https://performance-1.co.uk/article/grace-under-fire/

Ghate, Lewis & Welbourn; System Leadership – exceptional leadership for exceptional times – Virtual Staff College

Available at
https://www.nationalvoices.org.uk/wellbeing-our-way/systems-leadership

Lakoff, George (2014); The All New Don't Think of an Elephant! Chelsea Green Publishing Company

Udall, Nick (2018); Holding Space: the high art of leadership

Available at
https://www.linkedin.com/pulse/holding-space-high-art-leadership-nick-udall

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