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THREE

Leading Faith Formation 2020

▶ Faith Formation 2020 presents new challenges for leaders and requires particu-
lar knowledge and skill for effective leadership. Chapter 3 presents six of the
most important competencies necessary for leading a congregation's Faith Formation
2020 plan and implementation. Chapter 3 is not intended as a presentation of con-
temporary leadership thinking and its application to Christian leadership. These six
competencies have been selected because of their relevance to the designing, imple-
menting, and leading Faith Formation 2020 in a church. The six leadership compe-
tencies include:

1. Becoming an Adaptive Leader
2. Becoming an Innovative Leader
3. Becoming a "Blue Ocean" Leader
4. Becoming a Change Leader
5. Becoming a Culturally Intelligent Leader
6. Becoming a Curator of Content

There are tools for the first five leadership competencies at the end of Chapter 3 that
can help you apply the content and processes to your church community.

Becoming an Adaptive Leader

Leadership experts Ronald Heifetz and Marty Linsky define leadership as *"the activity of mobilizing people to tackle the toughest problems and do the adaptive work necessary to achieve progress."* Leadership would be an easy and safe undertaking if organizations and communities only faced problems for which they already knew the solutions. Everyday, people have problems for which they do, in fact, have the necessary know-how and procedures—what leadership experts Ronald Heifetz and Marty Linsky call *technical problems.* But there are also a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides answers from on high. Heifetz and Linsky refer to these problems as *adaptive challenges* because they require experiments, new discoveries, and adjustments from numerous places in the organization or community. Without learning new ways—changing attitudes, values, and deep-seated behaviors—people cannot make the adaptive leap necessary to thrive in the new environment. The sustainability of real change depends on having the people with the problem internalize the change itself.

Sharon Daloz Parks, in *Leadership Can Be Taught,* describes the distinction between technical and adaptive issues:

> *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—those challenges that cannot be resolved by expert knowledge and routine management alone. Adaptive challenges often appear as swamp issues—tangled, complex problems composed of multiple systems that resist technical analysis and thus stand in contrast to the high, hard ground issues that are easier to address but where less is at stake for the organization or the society. They ask for more than changes in routine or mere performance. They call for changes of heart and mind—the transformation of long-standing habits and deeply held assumptions and values. (Parks, 10)

Technical problems are well defined: their solutions are known and those with adequate expertise and organizational capacity can solve them. For example, a church that sees the participation of children and their families decline in the summer can develop a multi-week Vacation Bible School program that engages children and their parents during the summer months. It is a technical problem because the resources are available for purchase and the implementation tasks, while requiring plenty of work, are well known and within the existing skill-set of the church's faith formation leadership.

Adaptive challenges are entirely different. The challenge is complex and not so well defined, and the answers are not known in advance. Adaptive challenges require

innovation and learning. For example, developing a plan for the faith formation of Baby Boomers in a church is an adaptive challenge today. People in this generation present a whole new set of challenges and opportunities for churches. They bring new spiritual and religious needs, and are creating a new "stage of life" that combines work, retirement, volunteerism, and family. There are few established models or resources for faith formation with this generation. This adaptive challenge will require creating new models and approaches, experimenting, evaluating, redesigning, and continuous learning.

Adaptive leadership is an iterative process that involves three key activities: (1) *observing* events and patterns around you; (2) *interpreting* what you are observing (developing multiple hypotheses about what is really going on; and (3) *designing* interventions based on the observations and interpretations to address the adaptive challenge you have identified. Each of these activities builds on the ones that come before it; and the process overall is iterative: you repeatedly refine your observations, interpretations, and interventions. The process for developing a Lifelong Faith Formation Network and creating innovations described in chapter 2 of this book reflects this adaptive leadership process of observing, interpreting, and designing.
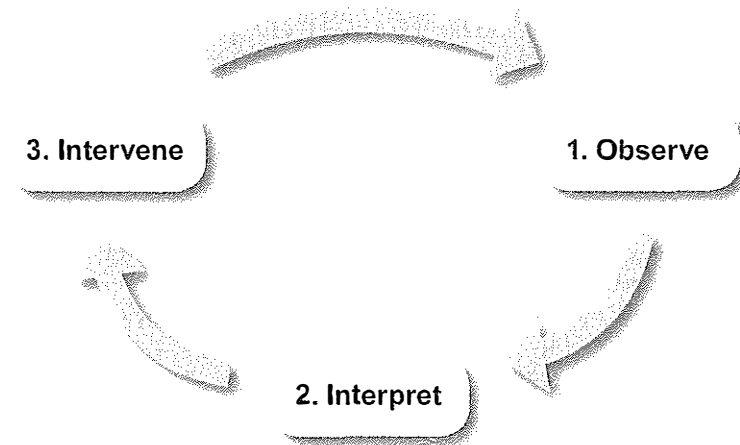
In the view of Heifetz and Linsky, leadership is about mobilizing a congregation to engage its own most pressing problems and deepest challenges. Leadership builds capacity and sustainability within a congregation as it mobilizes a congregation to engage and make progress on its deepest challenges. Leaders help people understand the changed nature of their situation, and develop new ways of doing faith formation and being church. Mobilizing people for adaptive work is to help them enter into that zone of risk where new learning and new self-understanding, as well as new ways of acting, can be discerned.

"What Heifetz describes as adaptive work is, at its heart, spiritual work. It involves the central dynamics of the spiritual life and of transformation, which includes loss, risk and trust, even death and resurrection. Our sacred Scriptures, sacraments and our symbols are all powerful resources for adaptive challenges and adaptive work that we face at this time. No program, effort at restructuring, or 'right' pastor alone will meet this challenge. It involves our own changes of minds and hearts" (Robinson, 45).

The driving forces affecting the future of faith formation and the response to the challenges of the four scenarios will, for most churches, demand a response outside of their current "toolkit." In many churches there exists a gap between the vision of the scenarios and the church's current practices and operational capacity that cannot be closed by the expertise and procedures currently in place. Faith Formation 2020 represents an adaptive challenge that calls for innovation, experimentation, and continuous learning.

Resources on Adaptive Leadership

Ford, Kevin G. *Transforming Church: Bringing Out the Good to Get to Great.* Carol Stream: Tyndale, 2007.

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Heifetz, Ronald, and Marty Linsky. *Leadership on the Line: Staying Alive through the Dangers of Leading.* Cambridge: Harvard Business School Press, 2002.

Heifetz, Ronald, Marty Linsky, and Alexander Groshow. *The Practice of Adaptive Leadership.* Cambridge: Harvard Business School Press, 2009.

Parks, Sharon Daloz. *Leadership Can Be Taught: A Bold Approach for a Complex World.* Cambridge: Harvard Business School Press, 2005.

Robinson, Anthony B. *Leadership for Vital Congregations.* Cleveland: Pilgrim, 2006.

Video Presentations by Ronald Heifetz on Adaptive Leadership

Faith & Leadership (Duke University): www.faithandleadership.com/multimedia/ronald-heifetz-the-nature-adaptive-leadership

Institute for Educational Leadership (Ontario, Canada): www.education-leadership-ontario.ca/videos06-07.shtml

Vimeo Video Presentation: http://vimeo.com/13117695

Becoming an Innovative Leader

Innovation can be defined as people creating value through the implementation of new ideas. The challenge of the four scenarios and the unmet spiritual and religious needs of people in our communities call out for innovation and leaders who practice innovative processes and skills. In *The Ten Faces of Innovation* Tom Kelley describes ten people-centric tools developed at IDEO, an international design firm, that define some of the innovation roles that teams can use to express different points of view and create a broader range of innovative solutions. Innovation is all about people. It is about the roles people can play, the hats they can put on, the personas they can adopt.

These ten faces of innovation provide methods and techniques that a team can use to infuse a continuous spirit of innovation in a congregation.

The Three Learning Roles

Churches need constantly to gather new sources of information in order to expand their knowledge and grow. These three learning roles help keep your team from becoming too internally focused, and remind everyone not to be so smug about what you "know." People who adopt the learning roles are humble enough to question their own worldview, and in doing so they remain open to new insights every day.

1. *The Anthropologist* is the person who ventures into the field to observe how people interact with daily life and experiences in order to come up with new innovations. The Anthropologist is extremely good at reframing a problem in a new way, applying it to daily life. Anthropologists share such distinguishing characteristics as the wisdom to observe with a truly open mind, empathy, intuition, the ability to "see" things that have gone unnoticed, a tendency to keep running lists of innovative concepts worth emulating and problems that need solving, and a way of seeking inspiration in unusual places.

    Faith Formation 2020 Examples: conducting focus groups, interviewing people, observing people's everyday life (school, work, shopping, recreation, and so on), identifying where and how people spend their time and money

2. *The Experimenter* celebrates the process, not the tool, testing and retesting potential ways to make ideas tangible. A calculated risk-taker, this person models everything from programs to activities to resources in order to efficiently reach a solution. To share the fun of discovery, the Experimenter invites others to collaborate.

    Faith Formation 2020 Example: piloting a program and receiving feedback from the participants that can be used to improve and expand the program

3. *The Cross-Pollinator* draws associations and connections between seemingly unrelated ideas or concepts to break new ground. Armed with a wide set of interests, an avid curiosity, and an aptitude for learning and teaching, the Cross-Pollinator brings in big ideas from the outside world to enliven their organization. People in this role can often be identified by their open mindedness, diligent note-taking, tendency to think in metaphors, and ability to reap inspiration from constraints.

    Faith Formation 2020 Example: bringing ideas from a variety of sources and locations (books, websites, other churches) into the

design process; exploring how other organizations and businesses reach people (for example, museums, community centers, gyms, coffee shops, arts and music performances) and the types of activities they sponsor to engage people; investigating what is working at other churches and synagogues

The Three Organizing Roles

Organizing roles are played by individuals who are savvy about the often counterintuitive process of how organizations move ideas forward. Many believe that good ideas should speak for themselves. The Hurdler, the Collaborator, and the Director know that even the best ideas must continuously compete for time, attention, and resources. Those who adopt these organizing roles don't dismiss the process of budget and resource allocation.

4. *The Hurdler* is a tireless problem-solver who gets a charge out of tackling something that's never been done before. When confronted with a challenge, the Hurdler gracefully sidesteps the obstacle while maintaining a quiet, positive determination. This optimism and perseverance can help big ideas upend the status quo as well as turn setbacks into an organization's greatest successes.

    Faith Formation 2020 Examples: leading problem-solving and finding alternative ways to doing things, finding discounts and low-cost ways to implement an innovation, connecting with people who can contribute services for free or at cost to move a project ahead

5. *The Collaborator* is the rare person who truly values the team over the individual. In the interest of getting things done, the Collaborator coaxes people out of their work silos to form multidisciplinary teams. In doing so, the person in this role dissolves traditional boundaries within the church and creates opportunities for team members to assume new roles. More of a coach, the Collaborator instills the team with the confidence and skills needed to complete the shared journey.

    Faith Formation 2020 Examples: facilitating teamwork through the planning and design work, involving people outside of the team (in the church or community) to partner in the development of new initiatives, expanding the people and resources available to the team for designing and implementing initiatives by going outside the church community

6. *The Director* has an acute understanding of the bigger picture, with a firm grasp on the pulse of their church. Consequently, the Director is talented at setting the stage, targeting opportunities, bringing out the best in their players, and getting things done. Through empowerment and inspiration, the person in this role motivates those around them to take center stage and embrace the unexpected. Five traits of successful directors include: (1) they give center stage to others, (2) they love finding new projects, (3) they rise to tough challenges, (4) they shoot for the moon, and (5) they wield a large toolbox for solving problems and improvising.

    Faith Formation 2020 Examples: seeing the big picture of the four scenarios and keeping this vision in front of people at all times; equipping people for their roles and responsibilities in faith formation; uncovering new opportunities and projects for implementing the vision of faith formation; engaging the team in problem-solving and improvising

The Four Building Roles

The building roles apply insights from the learning roles and channel the empowerment from the organizing roles to make innovation happen. When people adopt the building personas, they stamp their mark on your organization. People in these roles are highly visible, so you'll often find them right at the heart of the action.

7. *The Experience Architect* is that person relentlessly focused on creating remarkable experiences for people. This person facilitates positive experiences through programs, activities, digital interactions, spaces, and events. Whether an architect or a sushi chef, the Experience Architect maps out how to turn something ordinary into something distinctive—even delightful—every chance they get.

    Faith Formation 2020 Example: designing and conducting new faith formation experiences that connect deeply with people's spiritual and religious needs and that are engaging, exciting, multisensory, and experiential

8. *The Set Designer* transforms physical environments into powerful tools to influence behavior and attitude and provide the optimal setting for learning and formation. They create spaces for work and planning that stimulate creativity. They design, redesign, and/or re-purpose spaces to make them conducive to learning and formation.

    Faith Formation 2020 Examples: creating engaging and multi-sensory spaces for faith formation at home, church, and in the community; creating and utilizing art to communicate the Christian faith; exploring new settings and venues for groups to gather for faith formation

9. *The Caregiver* is the foundation of human-powered innovation. Through empathy, Caregivers work to understand each individual and family and create relationships. Good Caregivers anticipate people's needs and are ready to respond. They keep the needs of people front and center in planning and implementation.

> Faith Formation 2020 Examples: attending to the needs and life situation of people in planning and implementation; personalizing and customizing the faith formation experience to address the spiritual and religious needs of people in all four scenarios; reaching out to people not engaged in faith formation and building relationships

10. *The Storyteller* builds both internal morale and external awareness through compelling narratives that communicate the vision and goals of faith formation, and real life stories of people in the four scenarios. The Storyteller goes beyond oral tradition to work in whatever medium best fits the message: video, narrative, animation. The Storyteller presents the stories of those who have benefited from faith formation. The Storyteller can spark emotion and urgency, transmit vision and goals, and lead people to action and involvement.

> Faith Formation 2020 Examples: producing audio and video stories of people's spiritual and religious needs in each of the four scenarios and explaining why the church needs to respond; producing audio and video accounts of people's participation in faith formation; telling the story of Faith Formation 2020 in a church and the many faith formation offerings in a church through print and video presentations

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Resources on Innovation

Brown, Tim. Change by Design: *How Design Thinking Transforms Organizations and Inspires Innovation*. New York: HarperBusiness, 2009.

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Kelley, Tom. *The Ten Faces of Innovation*. New York: Doubleday, 2005.

Websites

IDEO website: www.ideo.com

OpenIDEO website: http://openideo.com

Ten Faces of Innovation website: www.tenfacesofinnovation.com

Becoming a Blue Ocean Leader

In *Blue Ocean Strategy*, W. Chan Kim and Renee Mauborgne present the concept of a "Blue Ocean Strategy" as a way for an organization (your congregation) to enter a market or audience that's open and undisturbed (think of people not involved in church, new married couples, families with young children, people in their twenties and thirties).

When it comes to defining what Blue Ocean Strategy is, it helps to start by picturing a vast ocean. Most businesses are located in what the authors call a red ocean. The red ocean is jam-packed with other businesses, all offering similar products and services, and competing with each. Blue oceans are the exact opposite. Blue oceans are open and empty, with plenty of space to expand and sail where you want. In blue oceans there is often no competition, or, if there is any, it is effectively irrelevant to you because it can't touch you. Here demand, customers, and growth are yours for the taking. You and your organization stop using the competition as your benchmark, and go your own way.

Understanding Blue Ocean Strategy is easiest when you look at how an existing company has applied the concept successfully. For this example, let's look at Netflix, the online and rent-by-mail movie rental organization. Stop and think about how you borrowed movies in the late 1990s. You probably got them from a bricks and mortar store, at a fairly high price. And you had to return them promptly or face outrageously high late fees. This usually meant driving back to the store by 11:00 am. Until 1997, this was simply the way movies were rented. No one questioned it—at least until Netflix appeared. Netflix's approach was 100% consumer-focused, and its business model tore down the existing walls of the industry. Netflix created its blue ocean by being completely different from its competition:

- It had no store. Movies were chosen by customers online. This kept costs down for Netflix, and for its consumers.
- Since movies were mailed out, people no longer had to drive to drop them off.
- Postage was taken care of by Netflix, getting rid of another source of customer annoyance.
- Late fees were eliminated. You could keep a movie as long as you wanted.
- Movies could also be watched online. This eliminated waiting, and added considerable value for customers.
- Pricing was set using a flat-fee monthly membership structure, instead of on a "per movie" basis. This gave members more value for their money.

Netflix completely changed the way people rented movies, and changed how movie rental companies delivered those movies. As a result, they had complete control of the online and rent-by-mail market for almost a decade. Competition has now crept in, but Netflix has had such a big head start in the industry and has such a strong brand name that it's going to be hard for the competition to shake them.

It is important to realize that organizations don't have to completely redefine their industry or organization in order for Blue Ocean Strategy to work. Most of the time, blue oceans are created from within existing organizations. It's usually about designing one new product or service and linking it to what buyers really want, even if they don't realize they want it.

Peirce College is another example of a Blue Ocean Strategy. To break out of the red ocean of competition in the market of post-secondary education, Peirce has endeavored to offer unprecedented value to learners on the one hand and build a more efficient and cost effective business model on the other. The College has three interchangeable delivery systems: on-campus (land-based in Philadelphia); on-site (land-based corporate and community cluster locations); and online (Internet-mediated distance learning). They have produced educational options that are interchangeable: offering the same curricula and course syllabi; taught by the same professors; and yielding the same educational outcomes. Students have moved seamlessly among the three systems. This design has fostered quality assurance, convenience, and flexibility. Students have received the same highly relevant education regardless of whether they are in Philadelphia, Chicago, San Francisco, or Barcelona. Moreover, students around the country and across the globe receive high-quality and tailor-made customer services. They may register on a year-round basis and graduate from Peirce obtaining bachelor's degrees and relevant professional certifications. In the meantime, Peirce has managed to achieve all these breakthroughs in value for learners at the lowest possible costs. To fund the needed technological growth and development for delivering an unprecedented learning experience, Peirce diverted resources from those taken-for-granted areas of expenditure into areas that are central to learner's academic experience.

Peirce College started their journey of value innovation by looking at unmet needs of noncustomers. Whereas most colleges were focusing on serving traditional-age students, a vast pool of learners was overlooked or underserved. Working adults, for example, found it hard to complete an on-campus degree program while fulfilling their duties at work. Moreover, as adult learners mostly sought to improve their career prospect through enhancing their academic credentials, community and regional colleges that only offered associate degrees were less attractive to them. Next came military personal as well as those who worked in employment sectors that required constant relocation. Traditional campus-based learning models obviously did not suit their needs. Finally, there existed a vast number of learners residing in other regions or even in foreign countries that Peirce never considered as its potential customers. They found that, despite their differences, all these people wanted to pursue higher learning in a credible and high-quality program with a practical, career-oriented curriculum and flexibility in terms of registration, completion time, and learning location. Exploring the commonalities across these people provided Pierce with important insights for market reconstruction to pull in all-new demand.

Positive results emerged quickly. Online enrollment forecasts were exceeded by 300% in the first year alone. The market penetration moved across the country. Degree-seeking students have enrolled from forty-three of the fifty states, the District of Columbia, the U.S. Virgin Islands, and thirty other countries. The College has achieved a national scope with international reach in less than a decade. Beyond having access to vastly greater numbers of prospective students, the College unlocked markets among military personnel (active, reserves, and retired) as well as other employment sectors where relocation, and related disruptions to the educational process, are a significant challenge. Learners residing in more remote locations, with limited land-based educational options, emerged as an important constituency as have online community college students seeking a bachelor's degree while continuing to use the Internet platform in harmony with work/career responsibilities. The average age of a Peirce student shifted from 21.5 to 34.5 years.

Total enrollments nearly tripled. The College has enjoyed strong financial performance with a string of annual operating surpluses. This has enabled the College to properly resource further expansion; increase scholarship funds; avoid borrowing; improve employee compensation; and maintain one of the lowest private college tuition rates. About 65% of total annual tuition revenue comes from Peirce Online— a delivery system and source which did not exist ten years ago!

What would this concept mean for churches and Faith Formation 2020? A Blue Ocean Strategy is way to expand or grow faith formation—to re-imagine current faith formation offerings and design initiatives to reach new audiences (blue ocean). The four scenarios provide a way to envision the possibilities and create faith formation where there is no competition—within the church or even in the wider community. The Lifelong Faith Formation Network serves to expand faith formation to reach everyone, anytime, anywhere, 24/7/365. It opens up "blue ocean" for creating new faith formation programs, activities, and resources that do not have any internal competition and may not have any external competition. The responses to the Faith Formation 2020 scenarios can present a "blue ocean" opportunity for churches.

How can a church create a blue ocean in faith formation? Here are several factors to consider, translated from the business world into the church world:

1. How can we create high *quality* and exceptional experiences in faith formation for people that will change the lives of the target audience? Be sure to specify a target audience, such as young families or emerging adults or the Spiritual but Not Religious.

2. What are the strategic *factors* (time, cost, availability, location, and so on) that will unlock the target audience so that they will engage in a faith formation program, activity, or resource? Which are the most important factors? Once the most important strategic factors are establish to

reach the target audience, the value proposition of the strategic move is established.

3. What are the projected *outcomes* (number of people served, quality of participation, increased participation, and so on) that would describe the effectiveness of the initiative? (In the business world this would be the profit proposition. In churches it could be called the results proposition.)

4. What are the adoption hurdles in executing a blue ocean strategic move and how will you overcome these? This is the people proposition of blue ocean strategy.

In summary, to create a blue ocean successfully, a church should address quality, strategic factors, outcomes, and adoption sequentially and formulate and execute its strategic move by aligning value, results, and people propositions. To assess whether a blue ocean idea will be successful or not, consider the following: (1) if there is high quality and exceptional experiences in the idea; (2) if the strategic factors will make the idea accessible to the target audience; (3) if the projected results can be attained to ensure the effectiveness of the idea; and (4) if the adoption hurdles in actualizing the idea have been addressed. It is a simple but robust test that allows people to evaluate the success potential of blue ocean ideas and sheds light on how the idea may need to be improved to unlock a blue ocean of new audiences.

Resources

Kim, W. Chan and Renee Mauborgne. "Blue Ocean Strategy." *Harvard Business Review*. October 2004. Reprint #R0410D. (Also available at: http://mindsetandattractionmarketing. com/Blue_Ocean_Strategy.pdf)

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Lendo, Dr. Arthur J. "The Strategic Move of Peirce College." www.blueoceanstrategy.com/abo/peirce.html

Website
Blue Ocean Strategy website: www.blueoceanstrategy.com

Becoming a Change Leader

In their book *Switch: How to Change Things When Change Is Hard*, Chip and Dan Heath, authors and professors, ask why it's so hard to make lasting changes in our companies, in our communities, and in our own lives. The primary obstacle, say the Heaths, is a conflict that's built into our brains. Psychologists have discovered that our minds are ruled by two different systems—the rational mind and the emotional mind—that compete for control. The rational mind wants a great beach body; the emotional mind wants that Oreo cookie. The rational mind wants to change something at work; the emotional mind loves the comfort of the existing routine. This tension can doom a change effort—but if it is overcome, change can come quickly.

They propose a framework that sets out three ways change happens. (For practical checklists for each step of the process download *Switch Your Organization: A Workbook* by Chip and Dan Heath at http://heathbrothers.com/resources.)

1. *Direct the Rider* (the conscious mind), eliminating what looks like resistance but is more often a lack of clarity by providing crystal-clear direction.
    * Follow the bright spots: investigate what's working and clone it.
    * Script the critical moves: don't think big picture, think in terms of specific behaviors.
    * Point to the destination: change is easier when you know where you're going and why it's worth it.

2. *Motivate the Elephant* (the subconscious), eliminating what looks like laziness but is more often exhaustion by engaging emotions to get people on the same path as you.
    * Find the feeling: knowing something isn't enough to cause change. Make people feel something.
    * Shrink the change: break down the change until it no longer spooks the Elephant.
    * Grow your people: cultivate a sense of identity and instill the growth mindset.

3. *Shape the Path* (the situation), eliminating what looks like a people problem but is more often a situation problem, by making the environment more conducive to the change you seek.
    * Tweak the environment: when the situation changes, the behavior changes. So change the situation.
    * Build habits: when behavior is habitual, it's "free"—it doesn't tax the Rider. Look for ways to encourage habits.
    * Rally the herd: behavior is contagious. Help it spread.
    (Heath and Heath, 259)

A story in their book about hospitals and change illustrates the three elements of their approach.

In 2004, Donald Berwick, a doctor and the CEO of the Institute for Health-care Improvement (IHI), had some ideas about how to save lives—massive numbers of lives. Researchers at the IHI had analyzed patient care with the kinds of analytical tools used to assess the quality of cars coming off a pro-duction line. They discovered that the "defect" rate in health care was as high as 1 in 10—meaning, for example, that 10% of patients did not receive their antibiotics in the specified time. This was a shockingly high defect rate—many other industries had managed to achieve performance at levels of 1 error in 1,000 cases (and often far better). Berwick knew that the high medical defect rate meant that tens of thousands of patients were dying every year, unnecessarily.

Berwick's insight was that hospitals could benefit from the same kinds of rigorous process improvements that had worked in other industries. Couldn't a transplant operation be "produced" as consistently and flawlessly as a Toyota Camry?

Berwick's ideas were so well supported by research that they were essen-tially indisputable, yet little was happening. He certainly had no ability to force any changes on the industry. IHI had only seventy-five employees. But Berwick wasn't deterred.

On December 14, 2004, he gave a speech to a room full of hospital administrators at a large industry convention. He said, "Here is what I think we should do. I think we should save 100,000 lives. And I think we should do that by June 14, 2006—18 months from today. Some is not a number; soon is not a time. Here's the number: 100,000. Here's the time: June 14, 2006—9 a.m."

The crowd was astonished. The goal was daunting. But Berwick was quite serious about his intentions. He and his tiny team set out to do the impossible.

IHI proposed six very specific interventions to save lives. For instance, one asked hospitals to adopt a set of proven procedures for managing patients on ventilators, to prevent them from getting pneumonia, a common cause of unnecessary death. (One of the procedures called for a patient's head to be elevated between 30 and 45 degrees, so that oral secretions couldn't get into the windpipe.)

Of course, all hospital administrators agreed with the goal to save lives, but the road to that goal was filled with obstacles. For one thing, for a hospi-tal to reduce its "defect rate," it had to acknowledge having a defect rate. In other words, it had to admit that some patients were dying needless deaths. Hospital lawyers were not keen to put this admission on record.

Berwick knew he had to address the hospitals' squeamishness about admit-ting error. At his December 14 speech, he was joined by the mother of a girl who'd been killed by a medical error. She said, "I'm a little speechless, and I'm a little sad, because I know that if this campaign had been in place four or five years ago, that Josie would be fine. . . . But, I'm happy, I'm thrilled to be part of this, because I know you can do it, because you have to do it." Another guest on stage, the chair of the North Carolina State Hospital Asso-ciation, said: "An awful lot of people for a long time have had their heads in the sand on this issue, and it's time to do the right thing. It's as simple as that."

IHI made joining the campaign easy: It required only a one-page form signed by a hospital CEO. By two months after Berwick's speech, over a thousand hospitals had enrolled. Once a hospital enrolled, the IHI team helped the hospital embrace the new interventions. Team members pro-vided research, step-by-step instruction guides, and training. They arranged conference calls for hospital leaders to share their victories and struggles with one another. They encouraged hospitals with early successes to become "mentors" to hospitals just joining the campaign.

The friction in the system was substantial. Adopting the IHI interven-tions required hospitals to overcome decades' worth of habits and routines. Many doctors were irritated by the new procedures, which they perceived as constricting. But the adopting hospitals were seeing dramatic results, and their visible successes attracted more hospitals to join the campaign.

Eighteen months later, at the exact moment he'd promised to return—June 14, 2006, at 9 a.m.—Berwick took the stage again to announce the results: "Hospitals enrolled in the 100,000 Lives Campaign have collectively prevented an estimated 122,300 avoidable deaths and, as importantly, have begun to institutionalize new standards of care that will continue to save lives and improve health outcomes into the future."

The crowd was euphoric. Don Berwick, with his 75-person team at IHI, had convinced thousands of hospitals to change their behavior, and col-lectively, they'd saved 122,300 lives—the equivalent of throwing a life pre-server to every man, woman, and child in Ann Arbor, Michigan.

This outcome was the fulfillment of the vision Berwick had articulated as he closed his speech eighteen months earlier, about how the world would look when hospitals achieved the 100,000 lives goal: "And, we will celebrate. Start-ing with pizza, and ending with champagne. We will celebrate the importance of what we have undertaken to do, the courage of honesty, the joy of com-panionship, the cleverness of a field operation, and the results we will achieve. We will celebrate ourselves, because the patients whose lives we save cannot join us, because their names can never be known. Our contribution will be what did not happen to them. And, though they are unknown, we will know that mothers and fathers are at graduations and weddings they would have

missed, and that grandchildren will know grandparents they might never have known, and holidays will be taken, and work completed, and books read, and symphonies heard, and gardens tended that, without our work, would have been only beds of weeds."

Don Berwick and his team catalyzed a change that saved 100,000 lives, yet Berwick himself wielded no power. He couldn't change the law. He couldn't fire hospital leaders who didn't agree with him. He couldn't pay bonuses to hospitals that accepted his proposals.

Berwick had the same tools the rest of us have. First, he directed his audience's Riders. The destination was crystal clear: Some is not a number; soon is not a time. Here's the number: 100,000. Here's the time: June 14, 2006—9 a.m. But that wasn't enough. He had to help hospitals figure out how to get there. So he proposed six specific interventions, such as elevating the heads of patients on ventilators, that were known to save lives. By staying laser-focused on these six interventions, Berwick made sure not to exhaust the Riders of his audience with endless behavioral changes.

Second, he motivated his audience's Elephants. He made them feel the need for change. Many of the people in the audience already knew the facts, but knowing was not enough. Berwick had to get beyond knowing, so he brought his audience face-to-face with the mother of the girl who'd been killed by a medical error: "I know that if this campaign had been in place four or five years ago, that Josie would be fine." Berwick was also careful to motivate the people who hadn't been in the room for his presentation. He didn't challenge people to "overhaul medicine" or "bring TQM to health care." He challenged them to save 100,000 lives. That speaks to anyone's Elephant.

Third, he shaped the Path. He made it easier for the hospitals to embrace the change. Think of the one-page enrollment form, the step-by-step instructions, the training, the support groups, the mentors. He was designing an environment that made it more likely for hospital administrators to reform. Berwick also knew that behavior was contagious. He used peer pressure to persuade hospitals to join the campaign. (Your rival hospital across town just signed on to help save 100,000 lives. Do you really want them to have the moral high ground?) He also connected people—he matched up people who were struggling to implement the changes with people who had mastered them, almost like the "mentors" found in Alcoholics Anonymous. Berwick was creating a support group for health care reform. (Heath and Heath, 19-23)

Resources

Heath, Chip and Dan Heath. *Switch: How to Change Things When Change Is Hard*. New York: Broadway, 2010.

Heath, Chip and Dan Heath. *Switch Your Organization: A Workbook*. Download from http://heathbrothers.com/resources.

Website

Heath Brothers: http://heathbrothers.com/
Podcast Series (http://heathbrothers.com/resources)
Switch for Managers
Switch for Marketers
Switch for the Social Sector
Switch for Personal Change

Becoming a Culturally Intelligent Leader

We move in and out of socioethnic cultures, generational cultures, and organizational cultures in our daily lives. Numerous other cultural contexts exist in our lives as well, including cultures organized by professional careers, gender-oriented cultures, and cultures characterized by sexual preference and socioeconomic difference. One of the essentials for leadership in the twenty-first century is the ability to develop cultural intelligence, that is a person's capability to function effectively in situations characterized by cultural diversity—ethnic, religious, generational, and organizational to name only four.

As the world becomes more connected than ever, cross-cultural interactions are becoming the critical issue of our day. Cultural intelligence is needed by ministry leaders all across the United States. The flattened world is bringing us more and more encounters with people who aren't like us. We cannot hope to become experts on every cultural context in which we find ourselves. But through cultural intelligence, we can enhance our ability to interact with one another in ways that are respectful, loving, and dignifying.

David Livermore illustrates the challenge of living in a culturally diverse world with this example of a youth leader in a congregation:

> Let's use a youth leader to think about the reasons a twenty-first century ministry leader needs cultural intelligence. In addition to serving youth from various ethnic backgrounds, a youth worker also deals with the generational divides between the youth, their parents, and the seniors in the church. On top of that, the youth pastor must learn the culture of the particular church and possibly the denomination of which it is a part. Who holds the power, how is conflict handled, and what are the sacred rituals? But then add to these differences the subcultures among the youth themselves, whether they be jocks, goths, rave enthusiasts, techies, or preppies. Increasingly youth base their cultural identity on issues such as sexual preference, social class, and musical genre. And then the youth leader must deal with the upcoming missions trip to Mexico. And the invitation to partner with an urban youth ministry nearby. And the overriding tension felt by youth pastors to engage students with the gospel while struggling to relate the church culture from

which they operate to the all-pervasive popular culture and Internet-linked world in which students feel most at home. Get the picture? Cultural intelligence relates to the everyday realities of life in the twenty-first century. (Livermore, 30)

Think about the five to ten different cultural contexts you most regularly encounter. What ethnic cultures are represented in your church, community, and work life? Where do you travel and who do you encounter? What organizational cultures do you engage week by week? What generational dynamics do you face among your family and friends, and in your church community?

David Livermore, in his books *Cultural Intelligence: Improving Your CQ to Engage Our Multicultural World* and *Leading with Cultural Intelligence*, describes four dimensions of cultural intelligence (CQ).

1. *CQ Knowledge* is understanding cross-cultural issues and differences. It is a person's knowledge of how cultures are similar and how cultures are different. It includes knowledge about cultural universals (for example, all cultures have language, values, symbols, rituals) and about unique cultural characteristics (for example, unique values, social interaction norms, religious beliefs, economic and legal systems, aesthetic values). The point is not to be an expert on every culture but to understand core cultural differences and their effects on everyday business.

2. *CQ Strategy (Interpretive)* is the degree to which people are mindful and aware when they interpret cross-culturally and make sense of culturally diverse experiences. Strategy CQ is awareness that individuals have different cultural value orientations and these different orientations influence perceptions, sense-making, motivation, and behavior. It includes thinking and strategizing before an encounter, checking assumptions during an encounter, and adjusting mental maps when actual experiences differ from expectations.

3. *CQ Drive (Motivation, Perseverance)* is the person's level of interest, drive, and motivation to adapt cross-culturally. Drive CQ involves interest in experiencing other cultures and the extent to which you think you are capable of interacting effectively with people who have different cultural backgrounds. It includes the intrinsic value that you place on diverse interactions—the enjoyment and sense of satisfaction (intangible benefits) people get personally when interacting with those who are different culturally from yourself. It includes the extrinsic value (tangible benefits) that you derive from diverse interactions—the instrumental benefits you get when interacting with those who are different culturally from yourself. Lastly, it includes a people's sense

of confidence that they can function effectively in different cultural settings or in diverse cultural settings where people have cultural backgrounds that are different from your own.

4. *CQ Action (Behavioral)* is the extent to which people appropriately change their verbal and nonverbal actions when they interact cross-culturally. It is the capability to change behavior to fit other cultures. This requires having a flexible repertoire of responses to suit various situations while still remaining true to one's self. Action CQ includes having and using a flexible range of non-verbal behaviors (that is, body language, physical gestures, facial expressions); having and using a flexible range of verbal behaviors (that is, accent, tone, expressiveness); modifying typical behavior, based on cultural differences, to put others at ease; and changing both verbal and nonverbal actions to fit the specifics of particular cultural interactions or settings.
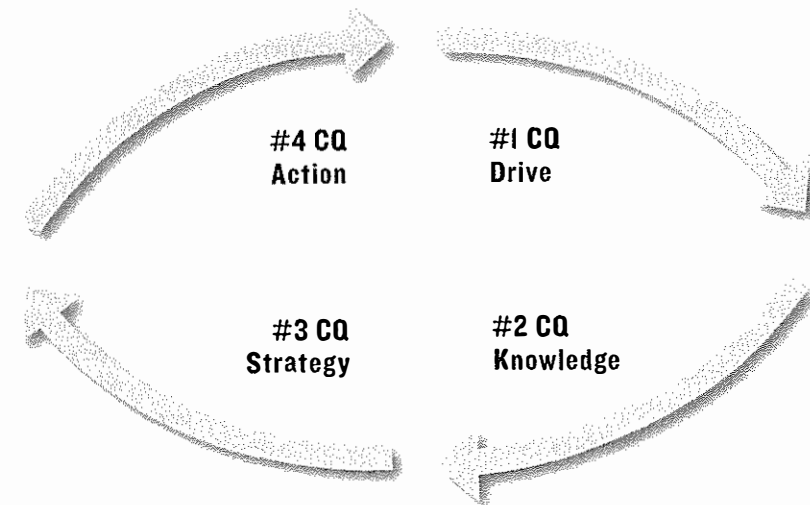
These four dimensions can be used by leaders as a four-step cycle for developing cultural intelligence both over the long haul and in case-by-case situations. Imagine using this process as a leader preparing to work with one cultural group (ethnic, social group, generational) in your church.

- *Step 1. CQ Drive* (motivational dimension): gives us the energy and self-confidence to pursue the needed understanding and planning necessary for a particular cross-cultural assignment. Leaders with high CQ drive are motivated to learn and adapt to new and diverse cultural settings. Their

confidence in their adaptive abilities is likely to influence the way they perform in multicultural situations.

What's my level of confidence and motivation for this cross-cultural situation?
If it's lacking, what can I do to increase it?

- *Step 2. CQ Knowledge* (cognitive dimension) provides us with an understanding of basic cultural issues that are relevant to this assignment. Leaders high in CQ knowledge have a rich, well-organized understanding of culture and how it affects the way people think and behave. They possess a repertoire of knowledge in knowing how cultures are alike and different. They understand how culture shapes behavior.

  What cultural understanding do I need for this cross-cultural situation?

- *Step 3. CQ Strategy* (metacognitive dimension) allows us to draw on our cultural understanding so we can plan and interpret what's going on in this situation. Leaders with a high CQ strategy develop ways to use cultural understanding to develop a plan for cross-cultural situations. These leaders are better able to monitor, analyze, and adjust their behaviors in different cultural settings. They are conscious of what they need to know about an unfamiliar culture.

  What do I need to plan in order to work cross-culturally effectively?

- *Step 4. CQ Action* (behavioral dimension) provides us with the ability to engage in effective, flexible leadership for a task. Leaders with high CQ action can draw on the other three dimensions to translate their enhanced motivation, understanding, and planning into action. They possess a broad repertoire of behaviors, which they can use depending on the context.

  What behaviors, such as verbal and nonverbal communication, should I adapt for this cross-cultural situation?

The four step cycle offers a promising way to move CQ from theory to practice. We can continually move through the four steps at a macro level in thinking about our overall leadership across a diversity of situations. And we can work through the loop even on the fly while engaging in cross-cultural conversations. (Adapted from *Leading with Cultural Intelligence* by David Livermore.)

Cultural intelligence is an essential skill for twenty-first century ministry leaders. It is what we need when we work with people from different cultural contexts, whether they're across the street or multiple time zones away. Cultural intelligence is needed when pastoring a church or leading faith formation in multicultural America, leading a ministry that serves various generational cultures, participating in short-term mission trips, or figuring out the organization dynamics of ministry where we serve.

Resources

Livermore, David A. *Cultural Intelligence: Improving Your CQ to Engage our Multicultural World.* Grand Rapids: Baker Academic, 2009. (Includes a cultural intelligence self-assessment.)
Livermore, David A. *Leading with Cultural Intelligence: The New Secret to Success.* New York: American Management Association, 2010.

Websites

Cultural Intelligence Center Website: http://culturalq.com
David Livermore Website: http://davidlivermore.com/cq

Video Presentations

David Livermore video: video: http://www.youtube.com/watch?v=SMi7yhHjASQ

Becoming a Curator of Content

Leading Faith Formation 2020 and the Lifelong Faith Formation Network with its diversity of programs, activities, and resources for all ages and generations will require a new role for leaders—to become *curators* of the faith formation content and experiences available to people in your congregation. The term "content curation" stems from traditional museum curation: museum curators collect art and artifacts and identify the most relevant or important to be displayed in an exhibit for the public. Museum curators are subject-matter experts that guide an organization's overall art collection.

The role of content curators is now being applied to online content. In the near future, experts predict that content on the web will double every seventy-two hours. This dramatic increase in information requires content curators who continually find, group, organize, and share the best and most relevant content on a specific issue or topic. Content curators can provide a personalized, qualified selection of the best and most relevant content and resources available. They do not create more content, but make sense of all the content that others are creating.

A curator is an individual or organization who excels at helping others make sense. A good curator must be skilled at:

- locating and evaluating valuable content
- organizing and connecting content so that it is as accessible as possible
- creating and re-purposing content when it adds to the underlying value
- capitalizing on the Social Web to build connections and context
- building trusted relationships with learners and other curators
- designing learning experiences

So how does content curation work? Just as librarians help us make sense of the overwhelming number of books and periodicals available in a library, content curators identify, organize, and share information that will be most relevant to their prospects.

1. *Identify*: The best librarians have access to hundreds, if not thousands, of information resources that deliver ongoing, real-time information on specific topics of interest to information patrons.

2. *Organize*: Librarians must consume and curate information in order to interpret and best understand how it addresses their patrons' information needs. Expert librarians can quickly process hundreds of documents daily, using tools that organize and automatically tag content, deliver summaries, and rank content as needed.

3. *Share*: This may be the easiest aspect of the curating role. Sharing requires that information is easily available for patrons to acquire and use on a recurring schedule. The internet—and a number of tools—makes it very easy to publish resources online. However, the best librarians are able to deliver relevant information, while also highlighting the relationships between that information so patrons can understand how all the content fits together.

Consider these three examples of content curation at work. The *NYTimes.com Topics* employs content managers who sift through *The Times'* archive to create new meaning by grouping articles and resources that were filed away (or distributed to library databases). The site also produces exceptional multimedia pieces akin to "special exhibitions," which offer a documentary and reflective aspect to news content. NBC Universal's video site *Hulu* takes videos sourced from multiple networks and then rearranges them into collections that give a new perspective to the collection as a whole. Duke University Divinity School's *Faith and Leadership* (www.faithandleadership.com) incorporates a website with print, audio, and video resources; a daily e-newsletter; and blogs with a diversity of nationally recognized bloggers (*Call and Response*) designed for Christian leaders to reflect, connect, learn, read, discuss, and imagine. The team at *Faith and Leadership* creates new content and makes available existing content from a wide variety of sources relevant for Christian leaders.

Faith formation leaders in churches will increasingly need to become *content and experience curators* as they expand faith formation into all four Faith Formation 2020 scenarios, reach new audiences with faith formation, and identify (or develop) new programs, activities, and resources to serve the expanded scope of faith formation. To address this expanded scope, faith formation leaders will need to identify and access a wider variety of content and experiences available from publishers, other

churches and religious organizations, websites, and other producers of content (programs, activities, and resources). They will need to assess and evaluate its quality and appropriateness, to organize the content, and then to share (or publish) the content through the Lifelong Faith Formation Network.

Among the many roles of the twenty-first-century faith formation leader, becoming a *curator of content* will be among the most important.

Resources

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Rosenbaum, Steven. "Can Curation Save Media. www.businessinsider.com/can-curation-save-media-2009-4#ixzz0xMUJYYuI

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