Webinar Transcript:

Introduction to Adaptive Leadership for Tackling Complex Family Planning Challenges – August 13, 2019

Erin Burks:
Hello, everyone. Thank you for joining us today. This is Erin Burks from the Title X Family Planning National Training Center. I'm pleased to welcome you all to today's webinar on Adaptive Leadership for Tackling Complex Family Planning Challenges.

[00:00:30]
Erin:
A few things before we begin. Everyone on the webinar today is muted given the large number of participants. We're going to introduce new resources today that are available on fpntc.org. After today's session, a recording of the webinar, the slide deck, and a transcript will be available on the FPNTC website. We encourage all of you to use these resources. They're great tools to help you build the adaptive leadership capacity of your staff and your network.

[00:01:00]
Erin:
Our speakers today work with the Family Planning National Training Center and are located at the University of North Carolina Gilling School of Global Public Health in Chapel Hill, North Carolina. First there is me, Erin Burks. I'm a research assistant with the FPNTC.

[00:01:30]
Erin:
We have Kristen Hassmiller-Lich here with us today. Kristen is faculty in the Department of Health Policy and Management. She has expertise in systems thinking, system mapping, modeling, and the use of local data to improve decision making and programs at multiple levels within health systems and to engage system stakeholders in the process. Of part of her FPNTC work, Kristen also provides Adaptive Leadership Coaching for Title X grantees.

[00:02:00]
Erin:
We also have Joan Healy with us today. Joan is program manager for the FPNTC and is in the Department of Maternal and Child Health at UNC. She has expertise in developing and implementing coaching, mentoring, training, health systems improvement programs and research for family planning and reproductive health programs in public, private, and nonprofit settings. Joan also provides Adaptive Leadership Coaching for Title X grantees.

[00:02:30]
Erin:
By the end of this webinar, you should be able to define adaptive leadership and explain why it is important for addressing complex family planning challenges, describe the purpose of the adaptive leadership tools available on the FPNTC website, and discuss how a Title X grantee use adaptive leadership skills and tools to address a complex family planning challenge.

Please use the chat at the bottom left of your screen to ask questions at any time. We'll address clarifying questions at the end of each section and as well as questions at the end of the presentation. Now, I will turn it over to Kristen to begin talking about adaptive leadership, Kristen.

[00:03:00]
Kristen Hassmiller-Lich:
Thanks, Erin. When we refer to leadership we're often thinking of technical leadership, leadership that helps us to address challenges and to solve well understood problems with clear and agreed upon solutions. But in this webinar, we're going to discuss another element of leadership, which is adaptive leadership.

[00:03:30]
Kristen:
Adaptive leadership is the ability to manage change effectively in complex and uncertain environments where knowing the causes of the problems we're working on, or deciding on solutions is not straightforward. There is not necessarily a best practice, or an expert that we can call for help.

Adaptive leadership can help you to better explore, define, and achieve agreement on complex challenges you face and to develop and implement potential solutions in the context of changing or uncertain circumstances.

[00:04:00]
Kristen:
Let's start by looking at some typical challenges you may be facing in your setting and explore, which technical and adaptive leadership skills are required to overcome those challenges.

For those participants working in a clinic setting, you may be undergoing or have already undergone the transition from paper-based clinic records to an electronic health record system. There are components of this challenge that require technical and adaptive leadership skills. Let's start with the technical.

[00:04:30]
Kristen:
There is considerable agreement that paper-based clinic records significantly limit the ability to document, to monitor, to improve the quality of services provided, and the ability to report on Title X service that you are providing. Selecting an installing an electronic health record system is an example of a technical challenge.

[00:05:00]
Kristen:
However, what about the changes the staff have to make in order for the transition to an electronic health record system to be successful? Do some staff feel strongly that the electronic record system

takes away from quality face-to-face interaction with clients, or maybe are some staff uncomfortable, or resistant to using new computer technology? What is needed to get staff buy in on the change, and to adjust to this new way of working?

[00:05:30]
Kristen:
When new systems are brought in without addressing underlying issues of staff concern or frustration, that can impact whether the initiative is successful or not. It's an adaptive challenge if there is not an agreement about the approach to transitioning, or certainty around how to approach the change among staff.

Another example of a challenge with both technical and adaptive components is the rising number of sexually transmitted diseases or STDS. On a national public health level, the rising number of STD cases is an alarming trend.

[00:06:00]
Kristen:
Specific examples, the CDC reports that gonorrhea diagnoses have increased 67% from 2013 to 2017. And primary and secondary syphilis has increased 76% between 2013 and 2017.

On a clinical level, there are evidence-based guidelines for screening and treatment of clients. For example, the CDC and The Office of Population Affairs' recommendations for quality family planning services, and the CDC's STD treatment guidelines provide technical guidance on assessment, screening, and treatment.

[00:06:30]
Kristen:
But over time, and as evidence-based guidelines evolve, providers must change their work processes accordingly. Making changes and adapting to new ways of work can be difficult, but it's still a technical challenge in that there are high levels of agreement and certainty about evidence-based practices relating to STDs.

[00:07:00]
Kristen:
Technical challenges have known solutions. The CDC recommends a renewed commitment to implementing technical guidance and for health care providers to make STD screening and timely treatment a standard part of medical care in order to reverse the current trends. However, the CDC acknowledges that they are uncertain about the reasons for these alarming increases in STDs and what might additionally be needed to address these increases beyond these best practices. Making matters worse, what matters in one community might differ from another, so part of this challenge is also adaptive.

[00:07:30]
Kristen:
For adaptive challenges, we need to create more agreement and certainty about the causes of the problem and about what to do about it. Adaptive challenges call for adaptive leadership approaches.

[00:08:00]

Kristen:
Suggested technical solutions include ensuring staff know the evidence based clinical guidelines and monitoring the adherence of them in your clinic. Potential adaptive solutions may require identifying what might be contributing to rising cases of STDS in your community and implementing actions designed to reverse those specific trends.

For example, addressing sub populations that are disengaged from your clinic's services, or increasing communication and coordination of care between your family planning and STD treatment services, which may be siloed in your setting.

[00:08:30]
Kristen:
To summarize, technical challenges are straightforward though not necessarily easy. There is typically agreement on what the problem is and there is more certainty about the cause of a challenge, and the appropriate solution even though it may be difficult to implement that solution. A technical challenge can be resolved with authoritative expertise through an organization's current processes.

[00:09:30]
Kristen:
Adaptive challenges are complex. The problem is often ill defined and ambiguous, lacking a known solution. There may not be wide agreement or certainty about the cause of the problem, or even if there is a problem, or what to do about it. If there is agreement on the best approach, specific solutions may still need to be tested. With an adaptive challenge, you may have tried to solve it using known solutions, but the challenge keeps recurring, or persists. You may not even be able to get started on addressing the challenge because no one agrees on what to try first. An adaptive challenge requires changing people's priorities, beliefs, habits, and even sometimes loyalties.

The landscape in which family planning services are delivered is continually changing. With changes in client needs, healthcare priorities, funding, and evidence-based practices come new opportunities and challenges. These challenges and opportunities call for leadership at all levels of an organization to manage change.

[00:10:00]
Kristen:
A survey of Title X grantees conducted in 2017 by the FPNTC, family planning agencies indicated a need for their leaders to improve capacity to identify and resolve adaptive challenges, challenges without a clear, or agreed upon definition, or readily identifiable solution.

[00:10:30]
Kristen:
Adaptive leadership recognizes that everyone can take on a leadership role. Adaptive leadership typically requires a different set of skills and competencies than we use when exercising technical leadership. To effectively manage change in complex and uncertain environments requires skills and competencies at the individual, team, organization or service system, and also the community or ecosystem levels.

[00:11:00]
Kristen:

Recently, Title X grantee and reproductive health leaders prioritized 34 adaptive leadership competencies for the Title X workforce. For example, individual competencies include problem solving and resilience. When working in teams, we need to be able to create shared visions and build effective teams. At an organization or service system level, we need systems thinking and continuous improvement competencies. Under the community or ecosystem level, competencies include promoting health equity and building stakeholder engagement among others.

[00:11:30]
Kristen:
Now let's hear from you, using a poll. Based on the description and definition of complex adaptive challenges that I've just talked through, please take a moment to think of an adaptive family planning challenge that you and/or your organization is facing.

[00:13:00]
Kristen:
With that challenge in mind, here you see some common adaptive challenges and themes that we see across family planning settings. Does your adaptive challenges fall into one of the following areas? If so, please select it in the poll. These include, ensuring adherence to policies and evidence-based practice that change, integrating family planning services into other services, resistance to changing cultural norms in your organization or partner organization. For example, we hear, "But, this is how we've always done it," or maybe something else. If you select other, please write a few keywords to describe your complex challenge in the chat box now. Keep in mind, an adaptive challenge may be one that's keeping you up at night. It may be a complex problem that keeps recurring despite applying known solutions, or one you just can't reach agreement or certainty on to begin to dig into. I'll give you a moment to complete the poll.

Kristen:
[00:14:00]
We're seeing another example getting typed in here, which is new Title X regulations without specific guidance, right. That's a great adaptive challenge. Stigma. We'll continue to take these other examples. But as these are being entered in, I just want to talk a little about what we're hearing.

[00:14:30]
Kristen:
About 10 of you, 9 of you, selected ensuring adherence to evidenced based practices. Let's discuss what some of these themes of adaptive challenges entail, so let's take that first one, ensuring adherence to policies and evidence-based practices. Let's consider one example of an evidence-based practice, HPV vaccinations.

[00:15:00]
Kristen:
In 2017, the CDC reports that, 49% of all adolescents aged 13-17 were up to date with the HPV vaccination schedule. HPV vaccination schedules are an evidence-based practice for which we have guidelines. Yet, the vaccinations covered is still below the Healthy People 2020 goal of 80%. Encouragingly, national coverage rates have increased in each successive year. However, factors that differ by community on both the patient and provider side may need to be addressed to increase vaccination coverage to recommended levels in your setting.

[00:16:00]
Kristen:
Among parents reporting that they are not planning to vaccinate their child, two of the most frequent reasons given are that the vaccine isn't necessary and safety concerns. While health providers may believe that HPV vaccine is necessary and safe, not all parents are in agreement. A provider's recommendation for a child to get the HPV vaccine is one of the most important factors influencing a patient's decision. I'm sorry. I said that wrong, influencing a parent's decision. While there have been great strides in providers recommending the vaccine, lower level of recommendations by providers serving clients of certain ethnic background suggest potential cultural or language barriers. Understanding which of these factors, its influence in the uptake of the HPV vaccine, and identifying appropriate strategies can make this a complex challenge in your setting.

[00:16:30]
Kristen:
19 of you selected integrating family planning services into other services. When we're trying to integrate any service it's critical that those involved have a shared vision for the integration of services, that staff understand their roles for provision of integrated services. The system needs to support new roles and ways of working. For example, there may be a family planning nurse who does all of the counseling and services and other staff in a facility may not be addressing family planning during other primary care visits.

Achieving integration of family planning throughout a primary care facility may require building a common vision amongst all staff about how they can achieve that goal, or come into agreement about new roles and responsibilities..

[00:17:30]
Kristen:
A lot of you selected resistance to change. 52 of you selected resistance to change in cultural norms in your organization or partner organization. This idea of, "But this is how we've always done it," so changing the way that things have always been done brings uncertainty and can be very uncomfortable. The challenge that requires people changing habits, priorities, and sometimes even values that can get in the way of trying new approaches to achieving the high-quality family planning services. Perhaps, staff are used to management telling them what needs changing, rather than staff feeling empowered to identify and make needed changes within their realm of responsibilities. Instilling new problem solving skills can be an adaptive component of this challenge. This again, is a very common theme that we see among adaptive challenges. Okay.

[00:18:00]
Kristen:
Typical adaptive leadership approaches involves convening staff, and/or stakeholders to learn together and achieve agreement on causes of problems, or their solutions, examining and describing patterns in your environment that suggest potential courses of action based on past trends, or designing and testing solutions to address the problems discussed among staff and/or stakeholders.

[00:19:00]
Kristen:
As with shifting to an evidenced based practice, challenges may have both technical and adaptive components. It is important to apply the right leadership and actions for the type of challenge you are

facing. Oftentimes, leaders apply technical solutions to complex adaptive challenges. This would not adequately address the complex adaptive nature of the challenge. As busy health professionals, we frequently find it easier to turn to an off the shelf solution, or call in a technical expert than to grapple with uncertainty and work on building agreement in your family planning service system.

[00:19:30]
Kristen:
But failing to meaningfully address the adaptive challenge tends to frustrate people. It does not really resolve the challenge. And conversely, we don't want to make things more complex than they need to be, so if a challenge is technical find the best practice or expert and work on implementing the solution. Learning to recognize the difference between technical and adaptive challenges and matching your leadership to the problem at hand is critical to your success.

In this next section, Joan is going to discuss how you can diagnose problems you are facing as either technical and/or adaptive. She'll introduce a few adaptive leadership tools available on fpntc.org to help you tackle the adaptive challenges you are facing.

[00:20:00]
Kristen:
But before I turn things over to Joan, let me pause for a second and ask whether anyone has any clarifying questions? If you do, feel free to type them into the chat box now. No questions yet, but we'll give you another 10 seconds or so to type out a question if you have one.

[00:20:30]
Joan Healy:
Okay, great. Thanks, Kristen for that introduction to adaptive leadership and why it's important for the Title X work. We'll also have time at the end of the presentations to take further questions, so as things come up make sure to jot them down and we'll come back to them.

[00:21:00]
Joan:
We now want to look at adaptive leadership tools that are available on the FPNTC website and how they can help you build your skills to better understand and address complex and persistent challenges.

[00:21:30]
Joan:
For example, adaptive leadership skills can help to build your problem solving skills and to gain agreement and certainty on how to proceed. On the FPNTC website, you will find Service System Strengthening under the Administration Operations heading within the Training Packages menu. By clicking on the Service System Strengthening tab, you can navigate to any of the tools we specifically categorized as Adaptive Leadership Tools.

[00:22:00]
Joan:
Here we have a view of the Service System Strengthening page. In the Service System Strengthening Training Package, you'll find tools and resources for understanding adaptive leadership and building adaptive leadership capacity with your team. Today, we'll review Adaptive Leadership for Tackling Complex Problems Toolkit, which provides a series of action steps and complementary tools that

support building adaptive leadership capacity. So, if you're just beginning to learn about adaptive leadership, we recommend starting with the toolkit resource.

[00:22:30]
Joan:
In the toolkit, the first thing you'll notice is a link to a short video, which introduces key concepts of adaptive leadership and highlights adaptive challenges in family planning settings. The toolkit essentially outlines three major principles of adaptive leadership, how it's important to begin by identify the root causes of a problem, to diagnose which root causes of a problem are technical and which are what we call adaptive, and to identify and use appropriate approaches to address complex adaptive challenges.

[00:23:00]
Joan:
Let's get started with Step 1. Identify the root causes of a problem.

[00:23:30]
Joan:
As we know in healthcare, it is crucial to diagnose a client's problem before prescribing treatment. Frequently, tests, time, thought, and discussion are devoted to assessing the client's problem first and treatment comes second. Similarly, an adaptive leadership understanding the problems thoroughly first can help you and your team to avoid wasting resources that only address the symptoms rather than the underlying root causes.

The Cause and Effect Diagram is a tool for diagnosing the problem by understanding the root causes. Other FPNTC resources such as the Model for Improvement E-Learning course provide additional tools for diagnosing root causes.

[00:24:30]
Joan:
Many of you may already be familiar with the Cause and Effect Diagram, also known as the fishbone diagram. The Cause and Effect Diagram is one adaptive leadership tool that identifies, sorts, and graphically displays all of the possible causes of a problem or a challenge. This tool helps you and your team or stakeholders to understand the root causes and relationships between the factors effecting a complex problem. Using this tool can spark conversation and build shared understanding and agreement about the causes of a problem and supports quality and systems improvement. After completing the diagram, the different causes underlying a problem become clearer and how different root causes are interrelated.

[00:25:00]
Joan:
When using the Cause and Effect or fishbone diagram, the main problem you or team are facing is the head of the fish. For example, one Title X grantee used the Cause and Effect Diagram to diagnose the root causes of an issue, the lack of integration of quality family planning services at federally qualified health center.

[00:25:30]
Joan:

The bones of the fish represent the primary root causes. Typical categories for main causes of a problem include people, policies, or the environment, procedures, and systems, or technology and materials. After identifying the primary root causes, the Cause and Effect tool is used to really dig deeper into those underlying causes.

In this example, you see here under the People category, that lack of knowledge and education about QFP and workload burden are contributing root causes in the People category for lack of integration of QFP, federally qualified health centers. You and your team can apply this tool to explore the root causes of any complex challenge that you're facing.

[00:26:00]
Joan:
Using the Cause and Effect Diagram requires honest and open communication about what people perceive of as the contributing causes. Those in management roles really need to cue their staff that it's safe to speak up when it comes to opinions or concerns related to tough challenges. Being able to call out the elephant in the room as needed is a key part of an adaptive culture within an agency.

[00:27:00]
Joan:
After determining the root causes of a problem, the next step is to identify if the root causes of the problem are technical or adaptive. The Agreement and Certainty Matrix will help delineate which root causes are technical and which are adaptive. You locate the root causes on the matrix depending on the level of certainty and the level of agreement among your team and/or key stakeholders. The degree of certainty runs on the horizontal access and certainty decreases as you move to the right. The level of agreement runs on the vertical access and agreement decreases as you move up. When there is high agreement and high certainty about the root cause of a problem, the root cause falls in the lower left corner of the matrix. This would be a technical problem.

[00:28:00]
Joan:
When there is less certainty and less agreement about the causes or potential solutions, the root cause falls in the complex area of the matrix and is therefore and adaptive problem. So, recall the root causes from the example of the integrating family planning in FQHCs. One of the root causes identified was lack of knowledge of QFP requirements. In this case, the challenge is well understood and there are known solutions, which include training providers and clinic staff on QFP requirements, which can be straightforward technical problems. However, we know that ensuring adherence to QFP is a different problem and may be complicated or a complex problem.

[00:28:30]
Joan:
From the previous example in the Cause and Effect Diagram, we recall that workload burden was listed as a root cause of lack of integration of QFP. Reducing workload burden of staff is a complex challenge that often lacks agreement or certainty about how to proceed. There may be some agreement on provider's workload burden being a deterrent to the inclusion of family planning counseling and primary care visits, there may be a lack of certainty about which solutions to address this issue will lead to better outcomes. Therefore, the workload burden falls in the complex adaptive area of the matrix.

[00:29:00]

Joan:
Depending on where you place the root cause of the challenge on the matrix, there will be a corresponding approach to developing the solution. Approaches to developing solutions as we see on the matrix can include direct approaches that involve assigning individuals to complete straightforward tasks, changing work processes, which involves revising work practices and procedures to address a problem. That's typically where there is sufficient control of variables to allow for planned changes within a system or organization.

[00:29:30]
Joan:
Modifying structure, it's similar to changing work processes. It involves adaptive or revising existing systems such as work group composition, meeting structures, and organizational reporting relationships to address a problem.

[00:30:00]
Joan:
Convening and intervening as we, again, move more towards areas of uncertainty or agreement and into the area of complex adaptive challenges. Convening and intervening involves gathering representatives involved in a complex problem to achieve agreement and certainty about the problem and appropriate solutions and subsequently, to test or implement a potential solution.

[00:30:30]
Joan:
Convening involves simply gathering representatives involved in a complex problem to achieve agreement and certainty about the problem's appropriate solutions, so you may not be ready to move into implementing those solutions. Again, with increasing uncertainty and agreement, you may need to examine and describe patterns by looking at information and analyzing trends in order to better understand the nature of the problem or the solutions that may have been used previously. And then finally, you may use an approach of seeking patterns. That just means continually scanning the context of the problem for any trends or patterns.

[00:31:30]
Joan:
In order to increase agreement and certainty for among staff for the problem of workload burden, an approach for developing a solution in your setting may to be examine and describe patterns to address the problem. To begin identifying potential solutions, you or/and your team may begin to examine and describe work patterns in your settings. By gathering providers and administrative staff to discuss roles and responsibilities and workflow, you may be able to identify tasks that providers do that support staff could take on in order to free up more time for family planning counseling as one of the examples of potential solutions.

[00:32:00]
Joan:
Now we want to turn to after you diagnose the problem, what are several possible next steps? The FPNTC has tools to further address these complex challenges. The following tools are examples of what you can use to build your skills in systems thinking, building effective teams, creating shared vision, problem solving, and continuous improvements.

[00:32:30]
Joan:
When you work with colleagues at times you may feel like the left hand doesn't know what the right hand is doing. The System Support Mapping Tool helps to build effective teams, identify targets for change and improvement, and better coordinate resources to achieve your common goals. It's difficult to change a system unless you understand the system. Using this tool, each team member identifies their roles, responsibilities, needs, resources and wishes within the system. This slide has a representation of a System Support Map. When team members gather to discuss their maps, the discussion can help identify gaps and commonalities and levels of support for achieving your goals.

[00:33:30]
Joan:
We focused on the importance of diagnosing challenges or problems you may be facing. However, you and your teams may be experiencing problem fatigue. The Appreciative Inquiry Tool can help overcome the negativity that comes from focusing solely on problems. The image on the slide is representative of what the Appreciative Inquiry process entails. First, defining the goal around a particular issue. Then discovering what works, dreaming about what could be, designing around practicalities in your setting, and delivering on the dreams. Adaptive challenges often require envisioning what an organization and service system will look like to best meet changing client needs. This tool helps you, your team, and stakeholders to appreciate what's working well and to build a shared vision for new innovative directions, goals, and plans based on your strengths.

[00:34:00]
Joan:
Family planning organizations have used the Appreciative Inquiry Tool with the external partners as well as internal team members. For example, a Title X clinic staff member who is responsible for coordinating with community partner agencies, use the Appreciative Inquiry Tool to overcome partner negative perceptions about family planning and to work toward a common vision for patient help and wellbeing in their community.

[00:34:30]
Joan:
Within another Title X grantee agency, team members use the Appreciative Inquiry tool to become more energized about their vision for success despite persistent problems and bureaucratic obstacles to implement in your program. By discussing what has worked well in the past and dreaming together about an ideal future, they were able to identify action steps that they believe will help them to achieve some breakthrough program results.

[00:35:00]
Joan:
As the saying goes, "If you're not part of the solution, you are part of the problem." Improvement Boards are a way to engage staff in being part of the solution. This tool helps to empower staff at all levels, especially frontline staff to identify and come to agreement about needed changes and to take ownership for implementing those solutions that they generate.

[00:35:30]
Joan:

The image on the slide is an example of an Improvement Board that begins with a section for employees to write ideas related to a certain goal. The group meets together to decide, which ideas to implement, and moves these to the launch section. The ideas requiring further discussion or approval are sent to the parking lot. If launched ideas are successful, the group writes what was successful about the idea, and then what are the progress and benefits of that idea related to the goal.

The Improvement Board is placed in a convenient location, so staff are able to monitor progress on improvement ideas and celebrate successes on a regular basis.

[00:36:00]
Joan:
Again, these tools we've reviewed on the FPNTC website. The tools are worksheets that describe the purpose, how the tools can help, and instructions for their use.

[00:36:30]
Joan:
But I just want to step back a moment and see if there is any question regarding these tools, or the purpose of the tools. Okay, so why don't we move forward and look at how a Title X grantee used adaptive leadership skills and tools to address a complex family planning challenge. Wait one moment, we do have a question coming in.

[00:37:00]
Erin:
We do have a question about system support maps. "What are the benefits for team members identifying gap and commonalities?"

Kristen:
Do you want me to take that?

Joan:
Yeah.

[00:38:00]
Kristen:
I can take that one. System Support Mapping is a tool that we have used often. There are many benefits that we hear team members express. One is just having an opportunity to do a structured deep dive. We don't often take the time to think about what we're being asked to do within a given scope of work, and to really process our thoughts on what we need to succeed, what resources are available, which are working for us, why, which not, and what we most need, so a big part of the benefit of the mapping is just actually creating your own map. And then having that to engage in conversations with other team members about how... to the one of the questions, how there might be overlap in what we're doing? Is there any redundancy? Are there gaps that we think the other person is doing that we're not? Are there ways that we can, realizing what each other needs, that we might find win-win compromises where we can help each other meet their... each other's needs better.

Erin:
Great. Thanks, Kristen. All right.

Joan:
Now if we want to move forward by looking at Title X grantees use of adoptive leadership skills and tools.

[00:38:30]
Joan:
On the map you can see the states where FPNTC has provided coaching to Title X grantees to build their adaptive leadership capacity. Coaching was a collaborative process in which grantees and FPNTC coaches discussed the challenge their network was facing, and then brought teams together to use adaptive leadership tools to address the challenge.

[00:39:00]
Joan:
Many grantees found the Adaptive Leadership Capacity Building to be a useful exercise. For example, one grantee said they were able to voice chronic issues they were having on their team that prevented good work from being done. Another said they often rushed through the decision-making process rather than examine and try to resolve underlying issues. The third said that the plan's use of all the adaptive... They plan to use all the adaptive leadership tools they were introduced to, to improve the quality of the work and strategically use their limited resources.

[00:39:30]
Joan:
Now let's look at one example of a Title X grantee using adaptive leadership tools for a challenge they faced. In July 2018, the FPNTC provided tailored coaching to the Louisiana Department of Health and hospitals to help build their adaptive leadership capacity to address challenges with their strategic planning processes.

[00:40:00]
Joan:
The Louisiana Department of Health first used the Cause and Effect Diagram to examine reasons why at times they have been unable to achieve a common understanding of strategic actions needed and development of actionable plans. The problem-solving tool helps Louisiana Department of Health to identify, graphically display, and see the relationships between the potential root causes of their problems.

[00:40:30]
Joan:
Here we see some of the root causes related to people and resources. Example of root causes that Louisiana team identified included staff lack of awareness about the evidence supporting some of their strategies and underlying issues related to resources such as community perceptions about inequitable resource allocation between our urban and rural sites and inadequate community input into priorities.

[00:41:30]
Joan:
With better understanding the root causes for not achieving common understanding of their strategic actions needed, the team proceeded to use the Agreement and Certainty Matrix to help identify the technical and adaptive elements of their root causes. For example, using the Agreement and Certainty Matrix the Louisiana staff were certain and in agreement that lack of awareness about evidence

supporting strategies was a cause for not achieving common understanding of the needed strategies and therefore, was a straightforward technical issue.

[00:42:00]
Joan:
Community perceptions about resource allocation and inadequate community input were identified as complex adaptive problems. While there was agreement and certainty that these were root causes contributing to not achieving common understanding on strategic actions, staff were uncertain about the best way to address these community perceptions and input to their strategic planning process. Once the team categorized the challenges as technical or adaptive, they followed the guidance from the Agreement Certainty Matrix to find an appropriate solution.

[00:42:30]
Joan:
The staff identified convening approach for including community partners early in the strategic planning process to give voice to their priority needs and get input on potential strategies. Staff identified the convene and intervene approach to bring community stakeholders together to develop scenarios that could guide the organization's resources allocation during strategic planning and increase community ownership and buy in to strategies and their implementations.

[00:43:00]
Joan:
Overall, Louisiana Department of Health and hospital staff were able to better understand the complexity of issues and identify ways improve their strategic and programmatic planning overall. Increasingly adaptive leadership capacity of the staff helped them to understand underlying causes of their problem, identify how to address their technical and adaptive components and identify appropriate approaches for addressing their challenge. These skills will not only improve their strategic planning processes, but also to improve other change efforts.

[00:43:30]
Joan:
Okay, we do have a question about the Agreement Certainty Matrix that I'll just take a moment to address. It says, "Can you clarify the certainty agreement levels are based on the number of people on the team who believe that this is a root cause?"

[00:44:30]
Joan:
Yeah, so when you're using the matrix it's meant to be used as a team activity. The number of people participating can vary, so the number of people who think you're close to agreement or close to certainty, you would be putting them on... your problem on the continuum based on how many people feel like they're certain that, that's a problem, or that they're in agreement that, that's a problem. Again, if you have universal agreement about a problem, and the solution than that would be a technical issue. Hopefully that clarified that question. If not, we can come back to that again in our question and answer session a little bit later.

[00:45:00]
Joan:

If you are a Title X grantee, you may be able to receive technical assistance and coaching through the FPNTC for a complex or persistent challenge you're grappling with. You may request TA in the area of Adaptive Leadership or any topic by submitting a Technical Assistance Request through the form located on the fpntc.org homepage. You'll find Adaptive Leadership under the subcategory of Service System Strengthening since adaptive leadership capacity is an essential component of a strong service system.

[00:45:30]
Joan:
Only agencies that directly receive Title X funds from [OPA 00:45:18] are eligible for the tailored TA. The Title X sub recipient agencies may be able to work with their grantee agency to request tailored assistance for a wide range of topics including Adaptive Leadership Coaching.

[00:46:00]
Joan:
We'll take time for any additional questions. Please use the chat features to type in your questions to us. I do know when we were planning this session there was a bit of a conflict with members of the Louisiana Department of Health team. That's why they aren't presenting their experience directly, but I did notice that their new Title X director, I believe is online for the session, so would welcome and encourage to share any other grantees who experienced coaching who are on the call to jump in if they have any comments or observations about using the adaptive leadership tools.

[00:46:30]
Erin:
Okay, so we see one question came in. It says, "I'm not in a management role. How can I influence my higher ups to take time for using an approach based in adaptive leadership for addressing these kinds of challenges?" Joan, do you want to take that one?

[00:47:00]
Joan:
Yeah. I think in the presentation we mentioned that adaptive leadership is meant for staff at all levels in an organization or a system. I think some of the tools like Improvement Boards are designed to help you figure out what you can do within your realm of responsibility. You may find things that you can do that don't require management's support in order to identify and implement change, so you may find that tool helpful.

[00:48:00]
Joan:
If you want to have a discussion with management about applying some of these adaptive approaches, you may try to think about a problem, or a situation in the past where slowing down to think about the problem before jumping into a solution would have been helpful, and just reminding ourselves that adaptive leadership is about stepping back momentarily, examining the problem, and figuring out what approach really makes sense. So, you may gain management buy in to the idea of working to gain more agreement or certainty about the issues that you're facing.

Erin:
Okay, we have another question. It says, "Can I use the Adaptive Leadership Tools even if I'm not sure my problem is an adaptive problem?" Kristen, do you want to take that one?

[00:49:00]
Kristen:
Sure. That is a great question. In our experience, many problems have both technical and adaptive components, so through using the first two tools that we talked about today, the Cause and Effect Diagram and the Agreement and Certainty Matrix, it'll help give you a better idea of the parts of the problem that you're going to have to pay attention to. Going through that effort will help you sort out which of them are technical and, which are adaptive. I think it's a good tool to use. If you're really not sure, it will help you tease apart which aspects of your problem are technical and adaptive or just confirm that you really are in fact dealing with a technical challenge. That there is agreement and certainty about both what the problem is, why it's a problem, and what to do about it.

[00:49:30]
Erin:
Excellent. Thank you. We also had a comment from Tisha from Louisiana. She says that, "This process helps bring people along and can settle those initial change resistant issues." She says, "It isn't a miracle, but it helps make concrete the very abstract thoughts and helps bring understanding to the group."

Kristen:
That's great. Yeah, it really creates the time and space to talk through it.

[00:50:00]
Joan:
That's great. I want to add here that I think within the Louisiana Department of Health there is a lot of support of some of the upper levels of the leadership for adaptive leadership and encouraging staff to really develop their skills in this area, so that's been really helpful as well.

Erin:
All right, so we're wrapping up our webinar today. I'm not seeing any more questions coming through. If anyone has any questions? Let me see if there is any coming in.

[00:50:30]
Joan:
Okay. We did have a note earlier in the adaptive challenges people were facing about with the rule changes just some of the issues that people are grappling with that.

[00:51:30]
Joan:
We did want to point out adaptive leadership tools don't address the content of Title X rule changes or compliance, so the Office of Population Affairs has been sharing and posting technical guidance documents on the rule changes and compliance and enforcement. But certainly, how your organization works to implement and achieve compliance with the rule changes may pose some challenges along the way. With the rule changes, for example, roles and responsibilities of staff at your service sites may need to change accordingly, so as Kristen was mentioning the System Support Map may prove useful for a site to review those roles and responsibilities to ensure that there is clarity on how staff will move forward and on how being... on being compliant and whether they are positioned to do so.

Joan:

And then with any changes come some degree of uncertainty, so as you implement rule changes you may experience unanticipated challenges or problems. Again, the tools that we looked at, the Cause and Effect and Agreement Certainty Matrix may help to better understand those problems or challenges.

[00:52:00]
Joan:
And then finally, as we mentioned, Title X grantees can request technical assistance for adaptive leadership coaching for you and your teams that can be tailored to your challenge or issue that you're facing.

[00:52:30]
Erin:
All right, so I'm not seeing any more questions coming in, all right. We'll post a recording of today's session, available within the next few days. It'll be available on fpntc.org. If you have any additional questions, please don't hesitate to email us at fpntc@jsi.com.

Erin:
Please also complete the evaluation today. It will pop up when you exit the session. We would love to hear your feedback and will use it to inform future webinars. And finally, we kindly ask that you please complete... Oops, sorry. I just said that. Like I said, we would love your feedback on the evaluation.

[00:53:00]
Erin:
If you need to receive a Certificate of Completion on the FPNTC website, you don't need to log onto fpntc.org before completing the evaluation. After you log in, you'll need to copy and paste the URL into a new tab if it doesn't launch automatically.

[00:53:30]
Erin:
All right, so with that let me just check if any final questions, none now. So, with that, thank you so much for joining today. That concludes today's webinar.