Bridging Leadership Intervention:
Understanding and co-creating the emerging leadership paradigm at Synergos Institute
[May 10 & 11, 2010]

Learning Report

by Manish Srivastava[1]

Abstract:

This report provides a detailed analysis of the process, learning and insights generated from the Bridging Leadership (BL) development intervention at Synergos Institute. The aim of this report is to help the Synergos leaders and workshop participants to understand:
- the underlying process and challenges of a BL intervention,
- the systemic overview of Synergos leadership context (generated from their collective data) and
- the content/ process required to design BL intervention (relevant to Synergos networks)

At the end of each session a process insight box is provided that highlights various moments of flow (that enabled the shift in consciousness) and stuck-ness (that held the energy) during the workshop.

While co-designing and facilitating this workshop with Surita and Adele, I got an opportunity to understand the organizational and leadership context of Synergos Institute. In the last section of this report (Recommendations and Next steps) I have synthesized the learning generated, from the pre-workshop inquiry, research and workshop feedback. It highlights some paradoxes and possibilities for leadership and organizational development at Synergos, using BL knowledge and practices.

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Context and Back ground:

"Despite the fact that bridging is an intuitive strategy for all Synergos' programs, we have never harvested the learnings from the initial bridging leadership case studies to inform ourselves about how we, as promoters of bridging, could be more effective building our own capacity or that of our various constituencies to bridge." –Peggy Dulany (2007).

Synergos Institute has been evolving a leadership framework to enable its vision of "bridging social and economic divides to reduce poverty and increase equity around the world". Over last 10 years, Synergos has engaged with a wide-range of development practitioners, academics and leaders to articulate this collaboration practice, called Bridging Leadership (BL). It has partnered with scholar-practitioners like Prof. Ernesto Garilao from AIM, Manila to co- develop the BL framework and applied the same in grass-root community leadership development in different contexts like India and Africa.

Synergos Institute has identified bridging leadership as a core area of practice that is inclusive and recognizes that the complexity can only be addressed by convening stakeholders across the divides. Synergos is keen to integrate the "core elements" of BL in internal organizational and leadership development and apply the same in their partnership projects and networks.

Pre-workshop inquiry and designing:

Design team (Surita, Adele & Manish[2]) had 4 conference calls over 2 months to understand the leadership development needs at Synergos. This was coupled with a pre-workshop survey for participants that aimed at understanding their perspective, hopes and concerns around the same (annexure 1). Based on insights from our initial inquiry, we did an extensive research into the rich history of BL evolution available on Synergos website, Peggy Dulany's research papers[3], BL case-studies, earlier workshops and evaluation reports and similar leadership work happening across Presencing Institute, MIT and other leading global institutions. Grounded theory methodology was used to harvest key insights, patterns and essence of leadership development and BL framework.

Learning:
The research highlighted that the BL framework and application has evolved at Synergos in different phases:
- Phase 1: BL as an action research study—to understand the competencies and internal processes of bridging leaders that Synergos worked with. This was done through case-studies.
- Phase 2: BL as a systemic change leadership capacity—developed by scholar-practitioners like Prof. Ernesto Garilao formerly of AIM-TeaM Energy Center for Bridging Societal Divides in the Philippines with a focus on Mindanao and applied by Synergos in multi-stakeholder partnership scenarios in India, Namibia etc.
- Phase 3: BL as an internal organizational development and leadership practice—This is the current stage where Synergos is seeking to integrate BL framework internally and across the whole organization.

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[2] This intervention was co-designed and co-facilitated by Surita Sandosham (providing strategic advice and organizational interface), Adele Wildschut (internal design consulting and facilitation) and Manish Srivastava (overall design, facilitation and process documentation responsibility).
[3] Peggy Dulany's papers (1997, 2007) give in-depth perspective on evolution of BL. Read here
http://www.synergos.org/knowledge/partnership/bridgingleadership/

From our initial inquiry it became clearer that-- while Synergos has done extensive action-research work to develop Bridging Leadership as a body of practice applied in its partnership programs with external stakeholders (phase 2), **it remains an enigma and far-off concept to the internal organizational reality** (phase 3). Later, this gap became evident while exploring participant's readiness to reflect within their own divides, engage with other stakeholders within Synergos Institution, and, co-create new prototypes to maximize our impact.

Furthermore, there has been enough buzz around BL as a new leadership concept that would impact managers' internal career development. As a result, we sensed some **internal resistance against the application of BL process within the internal-organizational reality**.

Design agreements:

Since BL itself is a long journey of distributed leadership development, we did not intend to provide a full experience in 2 days. Instead, we articulated our learning objectives to be:

- Understanding the emerging leadership paradigm in current context at Synergos
- Understanding the BL framework (overview) and experiencing some aspects of it
- Collectively identifying the core elements and practices for application in our work context

In addition, some of the design principles that we followed included:

- Co-creation: Facilitators embody the BL principles in every aspect of design and facilitation. (This made the whole process co-creative and internally congruent.)
- Presence: Work with the data in the room including fears, hopes, resistance etc.
- Emergence: Build the bridge as we move on to enable and demonstrate flexibility and emergence in design.
- Relevance: Must be relevant to the current reality of the participants and the organization.

The workshop:

Two days BL workshop was held at Synergos Institute head office in New York on May 10th and 11th, 2010. Participants included 9 program managers/ leaders (annexure 2). Peggy Dulany joined us for the morning session on day 1. The detailed workshop agenda is available as annexure 3.

Invitation:

- Invitation and check-in: We invited participants in a community circle. The check-in was a silent reflection and journaling process on 2 questions: What brings me here and What is holding me to be fully present in this space? Participants were not required to share the personal journaling in the plenary/ community space.
- Acknowledging hopes and fears: Participants were invited to write, on a paper card, any hopes or fears (about the workshop) that they might like to share. These cards were placed in the center of the circle on 2 charts. We then moved the charts with hopes and fears from the center to the community wall on our side.

Session 1: Evolution of Leadership in Synergos context (BL overview)

- Story weaving: Participants were invited to participate in the community ritual of story-weaving. Peggy started the story and shared her insights, earlier experiences, challenges and ideas that lead to the evolution of BL in Synergos. Other participants took the thread from her and weaved in their parts of the story including Adele, Surita, Beth, Chong-lim, Ferne, Sarina. Those participants (Katherine, Leslie, Desiree, Daniel and Virginia) who were not involved directly, in the application or evolution of BL, were invited to weave in their questions and comments in the story that is emerging for them now.

- Embracing the mystery of Bridging and Leadership:
  We explored the 2 basic metaphors of the 'Bridge' and the 'Leader' as it evolved in the Synergos story (relating to the story weaving exercise) and are reflected in the global context. We then looked into the emerging paradigms of leadership like Presencing, Theory U, Systemic change, eastern spirituality etc, that provide the underlying field from which BL framework has been evolved. (Annexure 4 contains the slides that were used during the 2 days of this workshop).

  An overview of BL framework was shared highlighting: the 3 key phases of a leadership journey (Ownership, Co-ownership & Co-creation), and; the inter-connections between them. The BL framework was further enriched by sharing real life case-studies from Synergos partners (Joe Madiath's story[4]) as well as facilitators' personal examples.

"in Synergos Context (we are clear about)… "What" (our work) – to create social justice, end poverty… "How" (our practice)– by empowering leaders and engaging across divides. But what we need to focus on is "Who"… the inner place from where we operate from (the blind-spot of leadership)[5]." (extracted from on learning notes[6] based on plenary discussions with participants)

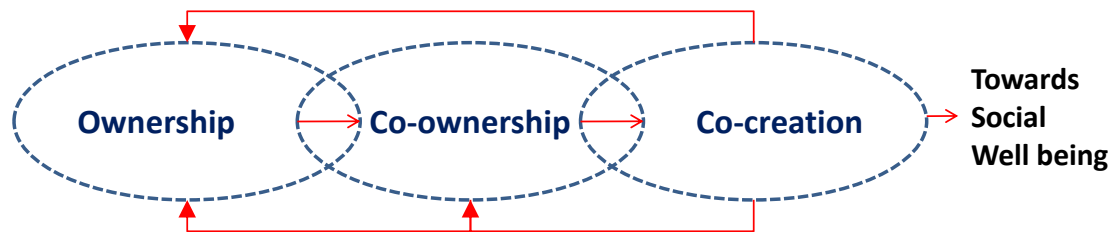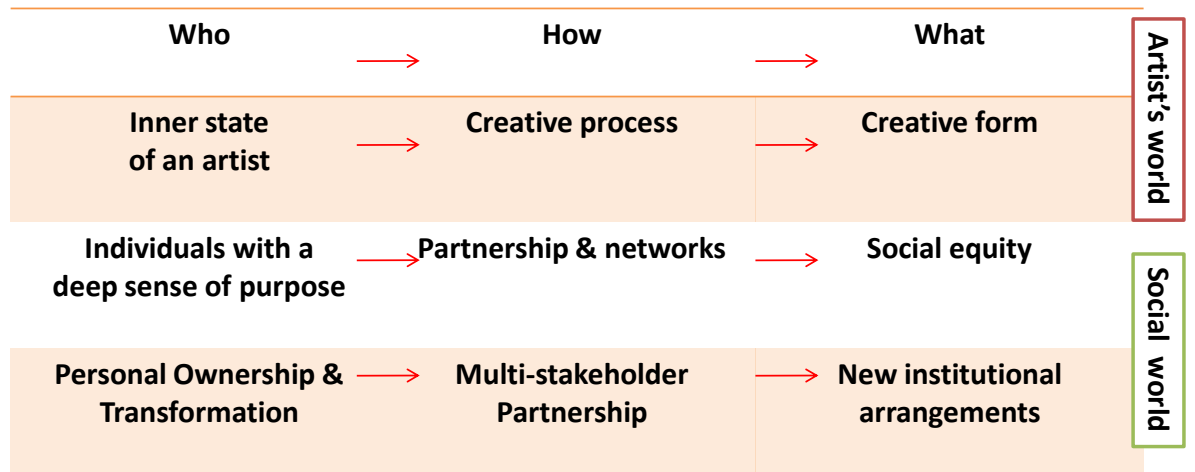---

Reflections/ Process insights:
- Validating hopes and fears, by first acknowledging it within and posting it on the community wall space, reflected the BL process of inclusion and movement from ownership to co-ownership.
- In story weaving participants could see the "cross-stitch", the big picture and experience co-ownership.
- Peggy's story helped in grounding BL in Synergos work context (as opposed to experiencing it as another management tool away from work reality).

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[4] Joe Madiath is founder of Gram Vikas, a leading NGO from India. He is a Ashoka Fellow and has been involved in evolution of Synergos Institute.
[5] The blind-spot of leadership is introduced by Otto Scharmer in his book Theory U: Leading from the future as it emerges.
[6] Learning notes were prepared by Andrew Richmond (who played the role of scribe), an intern with Synergos

Bridging Leadership: Overview

Who	→	How	→	What	
Inner state of an artist	→	Creative process	→	Creative form	Artist's world
Individuals with a deep sense of purpose	→	Partnership & networks	→	Social equity	Social world
Personal Ownership & Transformation	→	Multi-stakeholder Partnership	→	New institutional arrangements	

Ownership → Co-ownership → Co-creation → Towards Social Well being

Manish Srivastava/ May 2010

Session 2: Experiencing BL: Ownership:

In the ownership phase a leader takes an ongoing personal transformational journey. He understands his/her own divides—both internally (reflecting on his life journey and purpose) and externally (the systemic field of the issue he wants to address). He/she then develops an inner personal response to address his/her divides.

We used 3 reflective exercises to enable experience of this phase:
- Lifeline: Internal reflection on life journey
- Rich picture: external reflection on the systemic field
- Theory U based guided journaling: developing a personal response.

To enable deep-dive in reflective exercises, we watched the video clip from the movie "The Legends of Bagger Vance" and discussed the importance of being present in the moment, sensing the field and letting emerge the highest possible response (the swing).

"My leadership lifeline helped me reflect on the pivotal moments in life that influenced and shaped my personal journey. I would like to in-corporate (journaling & reflective practices) into my personal life practice. (and also) ..introduce to my network…" (reflections by a participant)

"I am in touch with myself. I appreciate 'on my own' reflection…" (reflections by a participant)

Reflection/ Process insights:
- Our design was based on inductive learning assumptions (i.e. concepts are generated from the experience). However some participants preferred to first understand the whole concept as used in AIM management school approach (deductive learning). We revised our design accordingly.
- Personal reflection, guided journaling and dialogue walk helped participants in seeking clarity of purpose however they felt that the "space was not safe enough" to share their reflections in the plenary. Being an internal work team, with pre-existing organizational power dynamics and unconscious resistance, it was difficult to share and learn together on day 1. In a couple of cases using the reflection tool personally brought valuable personal insights.
- It's difficult to articulate one's purpose of life. Working with the emerging life story is a better idea.

Session 3: Experiencing BL: Co-ownership

As the leader seeks clarity about his/her own personal response for addressing the divide, s/he identifies and engages with other stakeholders. S/he co-facilitates partnerships and dialogues that leads to agreements and shared leadership on the issues that all stakeholders collectively want to address.

Here again, we used 3 exercises to experience the essence of co-ownership phase.
- Reflective dialogue on "generative listening and shared leadership" based on Zubin Mehta and Plácido Domingo video-clip "Three Tenors Concert in 1990, Rome"
- Stakeholder mapping & analysis
- Multi-stakeholder dialogue process using Open Space Technology (OST)

We can use different stakeholder mapping and dialogue/engagement processes to facilitate co-ownership. The intervention chosen depends on the situation analysis. It may require exploration, in-depth inquiry or convergence among stakeholder on the given issues. It may be collective or one-on-one engagement. Either way dialogue processes lead to clarity and co-ownership of the issue.

To make the experience real (rather than a simulation), we picked a live organizational challenge for deeper exploration using Open Space Technology (OST). Also, based on our experience of unconscious resistance on Day1, we decided to use this opportunity to co-create a safe space for working with the issues present in the room. Participants engaged in the open space and harvested collective insights and inquiry on 2 key areas of focus related to the OST theme and BL application.

OST theme: "How can we connect the dots throughout the organization to influence and maximize our impact?"	
Insights on application of BL: - BL leads to more effective change- what change looks like depends on circumstances and desired achievements. - GPC members can use more training. - We ultimately don't have direct control over the impact of BL. - Partnerships have a closer intervention point vis a vis BL. - For networks, Synergos can teach, encourage model.	**Measuring impact to integrate BL within organization:** - The challenge is in showing-- how this way of working is effective; how BL is linked to outcomes of each program; evaluating qualities of people who've been exposed to BL. - Results could look like: better able to collaborate within or across sectors; personal characteristics e.g. enhanced listening capacity, more openness to engage, reflections; capacity to communicate across sectors; enhanced cultural sensitivity.
Questions yet to be explored: - What can we offer, and for whom? - How do we pass BL to GPC, SF members, Arab World Social Innovators and other networks? - How can BL be broken into stages, levels, etc? - Can we make BL material less theoretical and more applicable? - Can we deliver something to augment the qualities that make a BL (listening)?	

"This (co-ownership) was the most dynamic phase and one where each person had a voice and was able to take a stand" (reflections by a participant)

"the concept of 'two feet', 'bumblebee (used in open-space)… are a useful way to think about our role and promote self-awareness as we go through efforts to become unstuck" (reflections by a participant)

Reflection/ Process insights:
- We made a process-shift by using open space to work with the issue/divide present in the room (i.e. application of BL in work life). It helped in creating a safe space for deep-dialogue and shifted the energy towards co-ownership of the divide.
- Zubin Mehta's video clip lead to insights on: re-articulating the role of a leader as a conductor, importance of deep listening, shared leadership, letting-go the script, and, power of silence.

Session 4: Experiencing BL- Co-creation

At this phase the leader starts facilitating the shift from collective intention (co-ownership) to collective action (co-creation). S/he co-creates safe space or containers (new institutional arrangements, relationships networks, prototypes etc) where different stakeholders partner across the power and societal divides. Overtime, this leads to responsive institutions and empowered citizenry, working together for social equity.

Co-creation is a long and iterative process that cannot be simulated in a 2 day workshop. We used a video-clip from Gram Vikas[7] to understand the key components of co-creation process. However, to experience the real challenges and dynamics, we studied a live case from Synergos, using case-clinic methodology[8].

Adele offered her live case-study about BL application opportunity for leadership development and systemic change with a key government department in South Africa and asked for support from her colleagues (participants). Participants started engaging with the case as consultants (problem-solvers). However, after some reflection and authentic feedback by Adele (enabling ownership), they started empathizing with Adele's challenges,the complexity of the project and recognizing that what was being proposed was not a training but a process to shift the way chief directors operate within the government system (co-ownership). Some of the participants also offered their support to help Adele and co-create the same (towards co-creation).

"It was helpful to understand the context of South Africa and the BL initiative being prepared with DSD... in New York we are very removed from the impact of our work, geographically but also conceptually... removed from the people who are the targets of our work" (reflections by a participant)

"I liked this phase the most... (the insight that I would like to apply in my work is about) resolving power dynamics before bringing the groups together" (reflections by a participant)

Reflections/ Process insights:
- Case-clinic reflective process coupled by Adele's authentic feedback helped in moving from ownership to co-ownership and towards co-creation.
- Given time constraints at the end of the day, we could not leverage on the co-creative energy of the case-clinic and devise some real-time new institutional arrangements to help Adele in her work.

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[7] http://www.gramvikas.org/
[8] Case-clinic methodology is developed by Presencing Institute. It helps in "responding to an important and immediate leadership challenge better and more effectively"

Session 5: Co-designing a BL culture

- <u>Reflections-in-action</u>: Reflection space was provided at the end of each phase of ownership, co-ownership and co-creation. Participants recorded their reflections about the exercises and concepts that they experienced in each phase on a "reflection-in-action" sheet (annexure 5). Question and insights related to BL application were gathered and posted on the wall. Some of these were addressed immediately, while others were integrated in the evolving design (like the theme of open space).

- <u>Generating application insights</u>: In session 5, we integrated all questions and insights gathered through 2 days into a richer and contextual overview of the BL framework. Two insights stood out and resonated with the participant's inquiry:

  a) Understanding of the underlying principles or assumptions at each phase of leadership development would help in:
     1. sensing the field or stakeholder's context and
     2. choosing right tool or practice to enable their journey.

     We identified the key underlying assumption in each BL phase. Participants named some tools and existing sources that were available in Synergos (like the partnership database and BL website).

  b) Application of these principles must happen simultaneously at 3 levels—
     1. in our personal lives as leaders
     2. within the organizational/ team context, and;
     3. with our external stakeholders.

     BL concepts are rooted in the values of authenticity and inside-out transformation. **We would be inauthentic and ineffective in coaching bridging leadership to our networks or external stakeholders unless we are simultaneously practicing it within and across our teams/ networks and also in our personal life.**

- <u>Designing next steps</u>: Two sub-groups engaged in a brainstorming session to identify next steps for application of collective insights in their work context.

What insights you would like to apply in your personal and profession space in Synergos in next 3 months?	
For facilitating personal transformation (ownership): - Yoga, Journaling, Visioning, Meditating. - Time for personal reflection. - Strike balance b/w internal and external. - Find Better Rhythm. - Too much internal demand taking away from external responsibilities. - Loss of energy, momentum. Need renewal, regeneration.	**For facilitating collective/organizational transformation (co-ownership):** - Building alignment around organization's goals and activities (co-ownership). - Time for deeper personal interaction (social/ relationship capital). - Think more innovative in times of uncertainty. - Bring minds together to devise new approaches. - Don't have safe space for open dialogue.

"I really connected with the idea that personal authenticity reflects into the organization and team as well as external stakeholders. … how do I heal the inner wounds to be more effective in serving my constituents'" *(reflections by a participant)*

Reflection/ Process insights:

- The importance of authenticity and congruence between application of BL at personal, organizational and external stakeholder levels, resonated deeply with all participants as something that all leaders in Synergos must invest in. This validates our initial assessment that Synergos must focus on to develop bridging leaders and culture within the organization.
- While reviewing the overall BL framework participants appreciated the flexibility and adaptability of the framework to engage with tools and practices that are relevant to the context.
- Two brainstorming groups presented mixed results. One group sensed that time of 2-days was too short to understand BL and reflect on application insights.

Closing circle/ Check-out:

Finally, we gathered again in the community circle to check-out by sharing our reflections on: What am I taking from these 2 days?

Recommendations and Next steps:

While co-designing and facilitating this workshop with Surita and Adele, I got an opportunity to understand the organizational and leadership context of Synergos Institute. Based on the pre-workshop inquiry and feedback from the workshop I gathered following insights/assumptions about bridging leadership development at Synergos:

The paradox of Bridging at Synergos:

While Synergos is promoting bridging and partnership (BL research and application) in its external programs internally its members are experiencing divides within and at various levels: between geographies, between functions/departments and between leadership levels. This divide seems to be evident in less-than-optimal flow of knowledge, resources and relationships across the organization. Thus **while we seek to develop bridging leaders, partnerships and co-creation externally in our work context, internally we may be feeling fragmented and isolated.**

This paradox may also lead to a lack of trust in the process itself. Some symptoms that highlighted this paradox in the workshop are:
- Knowing-doing gap: Participants wanted to learn BL as a framework but were not comfortable to apply in their own context. BL does not speak to the internal organizational reality..
- Doing-being gap: We want to develop our external stakeholders to become bridging leaders but may not see ourselves as bridging leaders. Participants also felt that the internal space is not safe enough to do authentic reflections.

Way forward:

Paradoxes are natural processes in evolving a new consciousness. If we see BL as an emerging consciousness in Synergos context, I sense **this paradox signifies evolution to the next level of BL development** (as shared in pre-workshop inquiry). It is now focusing on integrating BL within organizational and internal leadership development.

Based on data from the workshop, I feel we might focus simultaneous development of BL application at 3 levels:

1. Personal: seeing the self (embodying the qualities) as a bridging leader. Creating safe-spaces, culture, rituals for deeper, authentic reflection and engagement. *Becoming a "Bridging Leader".*

2. Team/ organization: engaging with stakeholders across functions, networks, geographies. Co-creating new institutional arrangements to enable inter-dependence and maximize impact. Balancing flow and form. *Becoming a "systemic learning organization"*

3. External stakeholders: peer-coaching external stakeholders, facilitating ownership, co-ownership and co-creation of partnerships leading to social equity. *Becoming a "BL Coach"*

Some insights for future BL workshops:

Process insights from the BL workshop have been captured at the end of each session in this report. A quick summary of the learning for future workshops would be:

- <u>Time duration</u>: A minimum 3 days workshop is required to enable authentic reflection and engage with issues/ resistance in the room. 2-day workshop designs are too rushed and may become insensitive to participants' feelings and wounds that invariably get exposed in this process. If it's aimed to be a 'Train the Trainer' then 5 days are must.

- <u>BL as a change intervention</u> (not just training): Experiencing BL as a complete journey is more important than just understanding its tools and framework. To experience it must be applied to solve or explore the real-life personal/ organizational challenges. Simulations don't work and leave the experience fragmented.

- <u>Presencing/ Theory U frameworks</u> like generative listening, guided journaling, dialogue walk, case-clinic have been very effective in this workshop. Presencing provides a rich field of practices and knowledge that can be further integrated in for BL framework.

- <u>Coaching and peer-learning network</u>: The workshop should be followed-up with on-going coaching on real-life projects for personal or professional change for 3-6 month and 1-2 meetings in same cohort. This leads to formation of a peer-learning network and has been a cornerstone in success of BL (in Philippines) and similar systemic change leadership interventions (like Presencing Institute's ELIAS).

- <u>BL Community of Practice</u>: As we apply the BL principles and practices, both internally (across the organization) and externally (among our stakeholder groups, networks etc), we would evolve a network/ community of BL practitioners, coaches and learners. Such networks (for example the BL reference group formed in Southern Africa) could connect with similar BL networks in Philippines, India etc, to bring contextual experiences and enrich our collective body of knowledge and practices.

Resources

- Bridging Leadership on the Synergos Institute learning library: Rich depository of paper (including Peggy's papers/ essays), research documents, case-studies on BL. http://www.synergos.org/knowledge/partnership/bridgingleadership/
- Bridging Leadership fellow program , Manila: Gives an overview of how BL is being applied in Philippines. Website- http://blfellows.wordpress.com/about/
- Presencing Institute website for tools: Contains tools used in BL workshop including Journaling, Case-clinic etc. http://www.presencing.com/tools/
- Community Leadership Engagement and Action Planning- Bridging Leadership case-study from India- posted on Presencing Institute community website

Resources used in BL workshop (annexure):

1. Pre-workshop survey
2. List of participants
3. Workshop agenda along with flow of activities and list of tools used
4. Slides used during 2 days
5. Reflection in action sheet
6. Life-line exercise sheet