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# The Ripple Effect

Teaching Adaptive Leadership  
in Government

TOWN of CARY  
Case Study



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# The Ripple Effect

Teaching Adaptive Leadership in Government

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# The Ripple Effect

## Teaching Adaptive Leadership in Government

## Introduction

Beginning February 2018, 19 Town of Cary employees embarked on a journey together, meeting once a week for six months to learn and discuss leadership concepts foundational to Cary's new and evolving culture.

Just two years after Cary staff welcomed a new Town Manager to the team, the principles and values he brought with him reverberated across the organization, and that echo was only intensifying.

The leadership concepts that begun to take root in Cary stemmed from "Leadership on the Line" by Ronald A. Heifetz and Marty Linsky. The book describes the difference between technical problems and adaptive challenges: technical being those that are easy to identify with cut-and-dried solutions and adaptive being challenges that require changes in values, beliefs, roles, relationships and approaches to work.

While these concepts and principles had been discussed and exemplified over the previous two years, it was this experimental attempt at a culture and leadership training program that sparked a few to want to learn more and do more. When those 19 employees reached their final class with members of the Town Manager's Office serving as their instructors, they thought their journey together was coming to an end. What they didn't know was it was only beginning.

Following the conclusion of this inaugural training program, what were the effects of trying to teach adaptive leadership in a government setting?

## Class Members

### Participants

- Kim Branch, Assistant Finance Director
- Cassie Schumacher-Georgopoulos, Assistant Development Director
- Laura Turk, Assistant Human Resources Director
- Deanna Hawkes, Deputy Public Information Officer
- Carolyn Roman, Public Information Supervisor
- Brittany Strickland, Deputy Town Clerk
- Terry Yates, Smart Cities & IT Project Manager
- Ken Quinlan, Assistant Police Chief
- Mike Cooper, Assistant Fire Chief
- Sammy Wood, Transportation & Facilities Project Manager
- Kelly Blazey, Transit Services Administrator
- Billy Lee, Stormwater Engineering Manager
- Debra Grannan, Assistant Planning Director
- Katie Drye, Senior Planner
- Brian Stark, Inspections & Permits Operations Manager
- Luke Guthrie, Parks, Recreation and Cultural Resources Application Support Specialist
- Jim Hallows, Public Works Operations Manager
- Alex Jones, Water System Manager
- Toni Dezomits, Assistant Police Chief

### Teachers

- Sean Stegall, Town Manager
- Dan Ault, Assistant Town Manager
- Allison Hutchins, Organizational Development Manager

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### Background

Upon his arrival in Cary, Town Manager Sean Stegall shared the adaptive leadership concepts from “Leadership on the Line” with the department directors during their weekly meetings so they could begin to apply the concepts and sharing them with their respective departments.

While the information did spread organization wide, the concepts did not always resonate with department staff because they did not understand how they applied in a “Cary” context.

It was time for the organization to have another group of ambassadors to learn the adaptive leadership philosophies first-hand so they could continue to spread them across the Town.

To expedite this, Organizational Development Manager Allison Hutchins worked with Chief Human Resources Officer Renee Poole and Assistant Human Resources Director Laura Turk to select the 19 people who would participate in the class once a week for two hours. Each week the group would dissect a chapter of “Leadership on the Line” and how the concepts applied to their roles in the organization.

The goals laid out at the start of the inaugural Adaptive Leadership Class were:

- To be experimental
- To be a place where individuals could bring forward adaptive challenges they were facing, personally and professionally, for group discussion and feedback
- To teach a common language that could be used for the entire organization
- To develop a definition of what adaptive leadership means in Cary
- To prepare more people to teach adaptive leadership to others

“We are trying to create a class, an ongoing training program,” Stegall said. “The point is you are supposed to go off and do your thing and have that be a multiplying factor.”

Following the conclusion of the class, some of the participants did venture back to their spheres within the organization to share the concepts they learned and tackle challenges in a new and different way.

“I think everything that needs to be happening in the public sector is what was happening in those meetings,” Assistant Town Manager Dan Ault said. “I think there’s a lot of success that happened but it’s not all linear and it’s not all the same for every person.”

How Participants Described the Class



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### Our Successes

**“To me, it’s successful if there’s any sort of reflection, and I felt we got a lot of reflection out of it, and I don’t know if that would have happened on its own.”**

**Dan Ault**

Assistant Town Manager

Many of the participants were familiar with the adaptive leadership concepts prior to the class by reading “Leadership on the Line” and hearing about them from department directors. But the first Adaptive Leadership Class gave those concepts new meaning by allowing the group to apply them to Cary scenarios and make them personal.

“The class really helps in that it puts you in a position where you are able to see things you wouldn’t have otherwise seen,” Transportation & Facilities Project Manager Sammy Wood said. “It’s kind of like reading the book and then watching the movie. You just see things in the movie that you didn’t see in the book because you’ve got real actors.”

These examples pushed the group to a new level of understanding of adaptive leadership by making them reflect on themselves and how they handled challenges in the past.



Assistant Fire Chief Mike Cooper previously read “Leadership on the Line” in 2010 as part of the National Fire Academy but said he only thought about it from a fire department perspective instead of how it could apply to the entire organization.

“I was familiar with the book, and I thought I knew a little bit about adaptive leadership. But what I’ve come to realize is I probably knew very little about it,” he said. “[Before the class], there were times I didn’t necessarily say what people needed to hear at the right times, and I don’t think I was necessarily as good as I needed to be at understanding their loss. For me, I think those are two of the areas I’ve improved the most.”

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“People cannot see at the beginning of the adaptive process that the new situation will be any better than the current condition. What they do see clearly is the potential for loss. People frequently avoid painful adjustments in their lives if they can postpone them, place the burden on somebody else or call someone to the rescue.”

“Leadership on the Line” page 13

Assistant Development Director Cassie Schumacher-Georgopoulos said the class helped her take a step back and manage her hunger in order to determine where in the organization she can provide the most value and is “best suited to help the Town.”

“To me, it’s successful if there’s any sort of reflection,” Ault said. “And I felt we got a lot of reflection out of it, and I don’t know if that would have happened on its own.”

In addition to helping them better understand and relate to the adaptive leadership concepts laid out in “Leadership on the Line,” the class also helped its participants build confidence and partnerships, as well as better understand the other changes coming to the Town of Cary.

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### Building Confidence

When Senior Planner Katie Drye joined the Cary team in 2016, she was afraid to push too many boundaries or question processes at that time because she wanted to make a positive impression on her employer. But when the time was right, she began implementing a series of monthly meetings and bringing in people from multiple departments to discuss ongoing rezoning cases, which were previously handled by individual planners. She credited the class, combined with the successful implementation of these monthly meetings, with boosting her confidence in terms of exercising leadership.

“I learned that I’m not as afraid of leadership as I used to be,” she said. “I worked in other jobs where I’ve been given leadership responsibilities, and I’ve had some experiences where it hasn’t gone very well, so I honestly was a little afraid of being in a [position of authority]. Reading this book and being in this class has helped to rebuild some of my confidence. I felt emboldened to try new things.”

Other class participants echoed they felt the class, which was experimental in itself, encouraged them to ask questions and try new things.

“I had a unique opportunity to facilitate one of the class sessions,” Turk said. “That opportunity allowed me to explore and formulate how I would ‘teach’ and approach the particular chapter/concept and how best to guide the conversations. It was a good experience for me and one I appreciated.”

### Building OneCary Coalitions

With 19 participants representing all Town departments, the Adaptive Leadership Class also fostered cross-departmental collaboration, giving staff the chance to work with people they wouldn’t typically interact with. Over the six months, they developed a sense of rapport and trust among themselves, con-

tinuing to meet weekly once the class ended to discuss chapters of “The Practice of Adaptive Leadership” by Ronald Heifetz, Alexander Grashow and Marty Linsky, as well as challenges they faced. During that time, they served as one another’s confidants, friends and mentors.

One week when the group met after the formal class ended, Turk sought to solicit opinions about hiring new employees, specifically about what questions hiring managers ask the candidate’s current supervisor. Inspections & Permits Operations Manager Brian Stark referred to that time, where they could ask questions and solicit advice, as “invaluable.”

And some participants, including Drye, took the time to expand their coalition outside of the classroom.

“I’ve focused on building strong relationships with people that I work with so that when I propose some new, crazy ideas that are drastically different from the way things have happened before — rather than being shut down — people are a little open to it because I have focused so strongly on building their trust,” she said.

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Partners provide protection, and they create alliances for you with factions other than your own. They strengthen both you and your initiatives. With partners, you are not simply relying on the logical power of your arguments and evidence, you are building political power as well. Furthermore, the content of your ideas will improve if you take into account the validity of other viewpoints — especially if you can incorporate the views of those who differ markedly from you. This is especially critical when you are advancing a difficult issue or confronting a conflict of values.”

“Leadership on the Line” page 78

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### Understanding Disequilibrium

Throughout the class, Town staff simultaneously experienced a sense of disequilibrium as new organizational structure and staffing changes were rumored, considered, tested and announced.

Talk swirled around the Town's fire chief, who was also the planning director, being moved within the organization, the Public Information Office dissolved, and the planning and development services departments combined. Hearing about the changes taking shape helped class participants understand what those experiences were like for their classmates, as well as detect and manage feelings of loss.

"I feel so much less nervous about changes in the Town by being in that group," Water System Manager Alex Jones said. "The more I interacted with people who have kind of been in the thick of it, the less worried I got."

For some, the changes happened at a distance and weren't much more than rumors, but for others, it was their place within the organization under discussion. When the Town combined its Planning and Development Services departments, Schumacher-Georgopoulos became the assistant development director, a change discussed for at least six months before it was announced.

"It almost gives you an acknowledgment of why you might feel a certain way," Schumacher-Georgopoulos said. "For me, I think that's the biggest benefit of 'Leadership on the Line' is giving words to ways you've felt."

But despite the disequilibrium, the class helped many understand the changes and clarify the vision behind it.

"To understand and know where Sean is, to understand and know where I am, to understand and know



where the organization is and then being able to convey that not only to the Fire department but to other Town employees has challenged me," Cooper said. "It has completely changed the way I think."

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### Our Challenges

**“There’s lessons learned, but that’s a good thing. If there weren’t lessons learned from it then I think that would have been a failure. Part of it was we had to break some eggs to make an omelet.”**

**Dan Ault**

Assistant Town Manager

While many positive byproducts to the first Adaptive Leadership Class emerged, so did challenges; it took the group many months to open up to one another, and there was a heavy reliance on people in positions of authority to provide the answers.

“If the intention of the class was to hear how leadership here interpret the book, then I think it was really successful,” Drye said. “The interaction from the participants in the group didn’t really pick up until the end, so if we were intended to be interactive more throughout the process, I don’t know if we had enough time or if it was the right format to foster that.”

Early on in the class, town management instructed participants to use the time to bring their own adaptive challenges to the group for discussion and feedback. However, this concept seemed to have been lost along the way as many people felt there were plenty of textbook examples but not enough “Cary” examples more applicable to them. This left several people feeling like they still could not recognize or respond to an adaptive challenge.

“These sessions seemed watered down from the experience I had expected,” Schumacher-Georgopoulos said. “If these classes are to teach adaptive leadership, in the future, I would recommend more pointedly identifying and discussing the adaptive issues. More conversation about how to evaluate situations big or small and whether to approach them technically or adaptively.”

In addition to discussing smaller scale adaptive challenges, reducing the class size was another of the most suggested improvements. While most of the group said they were comfortable with the class size, there was a consistent opinion that conversation was often dominated by a handful of people, leaving others feeling “disengaged” and unable to contribute.

### Reliance on Authority Figures, Information

As people in the Adaptive Leadership Class began to feel the effects of change within the organization, they also began to use that class time to look to Stegall for answers about what changes were still to come and how it could impact them.

As more changes surfaced, their anxiety and insecurities grew, distracting them from the purpose of the class, Schumacher-Georgopoulos said, because they became reliant on that knowledge and face time with Stegall to “keep them going” through the organizational change.

“In the end, members were hungrier for this information than they were in learning how to trust themselves and make their own balcony perspectives,” she said.

“When people look to authorities for easy answers to adaptive challenges, they end up with dysfunction. They expect the person in charge to know what to do, and under the weight of that responsibility, those in authority frequently end up faking it or disappointing people, or they get spit out of the system in the belief that a new ‘leader’ will solve the problem.”

“Leadership on the Line” page 14

This issue came to a climax at a group meeting in July when no one from the Town Manager’s Office could attend. Transit Services Administrator Kelly Blazey

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shared she was hearing rumors the transit team would be moved from the Transportation & Facilities department, and she didn't know how to proceed in her role. This example sparked others to share their own anxieties about the future and frustrations about the pace of change.

Schumacher-Georgopoulos brought up her own experience with organizational change when the planning and development services departments were combined several months after she first heard about the potential change.

"The organization isn't setting people up to fail so [leadership] wants to make sure that when people are pushed out that things have been vetted and that there is a support system for them. ... I don't think that everyone was feeling that way that day."

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Habits, values and attitudes, even dysfunctional ones, are part of one's own identity. TO change the way people see and do things is to challenge how they define themselves."

"Leadership on the Line" page 27

Schumacher-Georgopoulos said the meeting in July demonstrated several people in the group were struggling with loss. She believed having smaller groups without Stegall attending every class could help future groups build relationships faster and better support one another. She said the inaugural group eventually got to that point.

"As strange or as surprising as that conversation was, I think there was a sense that we are here for each other. I think that's what the ultimate goal of that group was, for us to develop our own network of staff internally and being able to work together and not necessarily rely on the directors or to rely on Sean to feed us the information but to go to each other to solve problems, to learn from one another," she said.

### Breaking Up

On August 27, the final meeting that included the instructors was a particularly difficult one for many people in the class. A few vocal people spoke up and encouraged the group to continue to meet, learn from one another, improve processes together and share their experience in the class with others.

But the other half of the class shared confused looks with each other, unsure of how to feel about the sudden break and its cause, dissatisfied with the class's ending but unsure of what the end should look like.

While Stormwater Engineer Billy Lee thought the entire experience was rewarding and gave him confidence that the new culture would help the organization continue to be successful well into the future, he said the class's abrupt ending left the impression that the instructors were not as pleased with the outcome.

"I felt a sense of loss," he said. "It also felt to me like they thought the experience was not as successful as hoped and the instructors should not spend any more time with our group but that we should continue to meet among ourselves to help us grow."

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### Applying Adaptive Leadership

One goal of the class was to prepare participants to apply the principles of adaptive leadership to their everyday work, including recognizing and working through adaptive challenges, providing guidance to their coworkers and/or teaching future classes.

Following the conclusion of the class, participants began to differentiate themselves as either translators, ambassadors or teachers of the adaptive leadership principles.

“There’s a difference between discussing adaptive leadership and then teaching it. I don’t think that any of us are qualified to teach it yet,” Stegall said to the group.

#### Applying Adaptive Leadership

While their understanding of the adaptive leadership concepts varied, participants noticeably integrated them into their work, including spreading the common language to the rest of the organization.

“When we’ve talked about changes that we might be thinking about or questions that we might be having, it’s allowed me to really have a language and a voice for how I’m feeling about that,” Turk said.

In the Inspections & Permits Department, Stark said he now takes more time to get to the root of a problem before coming up with a solution. And in the Police Department, Assistant Police Chief Toni Dezomits began to notice a lack of giving the work back and a reliance on top leadership to make all the decisions within the department.

“In a few scenarios where I proposed giving the work back, there was a little confusion and some concern

that there would not be consistency across the work group if the authority figure did not oversee certain processes,” she said. “The processes in question were very appropriate for this particular group to oversee and did not require oversight at the level they were previously used to. Through the book, I was able to see that we should be giving more of the work back.”

#### Ready to Champion, Not Teach

Participating in the class led several members to set up or lead book clubs across the organization, reaching new staff members from CAD technicians to inspectors to water plant staff. These people serve as translators within the organization, sharing the common language and helping to explain the concepts to others.

“I do feel better positioned to promote and support the adaptive leadership framework,” Stark said. “We regularly reference the book, chapters or phrases while having discussions or addressing processes and procedures that may need to be revised or changed.”

But part of the reason some participants didn’t feel confident enough to teach adaptive leadership is because they still felt unable to recognize adaptive challenges themselves. Others said that even when they recognized them, they didn’t know how to respond to adaptive challenges.

“I feel better equipped to recognize situations but not fully confident in my ability to execute,” Public Information Supervisor Carolyn Roman said. “It’s a learning process, and we just need to place emphasis on using the book as a tool to navigate situations.”

#### Spreading Adaptive Leadership

In contrast, a few participants did begin teaching adaptive leadership concepts so those ideas could trickle down to others.

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"It's a bit overwhelming still what all has come out of [the class] because it precipitated a lot of change and a lot of different things going on," Jones said.

**Leadership Minute**

### Technical Challenges v. Adaptive Challenges

- Technical challenge: there is a known solution out there somewhere
- Adaptive challenge: no one knows the answer
- Even very innovative work can still be technical
- Adaptive work is hard, risky, and makes people uncomfortable
- Adaptive work often asks people to confront the gap between their values and behaviors

	<u>Technical</u>	<u>Adaptive</u>
What's the Work?	Apply current know-how	Learn new ways
Who Does the Work?	Authorities	The people with the problem

Reference: *The Heart of Danger*, pg. 14

In the Utilities department, Jones made a cliff notes version of "Leadership on the Line," which she called Leadership Minutes. Through Leadership Minutes, she presented a different adaptive leadership concept from the book each week using bullet points.

"It was really valuable to get that experience, and I also realized I would be doing my staff a disservice if I didn't make an effort to pay that information forward," she said.

Jones said "Leadership on the Line" gave her the tools she needed to better coach her employees. She instructed one person in her department on letting issues ripen and applying that concept so that others are more likely to entertain her ideas on process improvements.

"She's been really pleased getting to see her colleagues listen to her now," Jones said. "There's been things that's she's wanted to do for years and it never went anywhere, and now she's making some changes."

In the Transportation & Facilities Department, Wood helped Lee and Blazey facilitate another group meeting called "Balancing Adaptive Leadership." Wood described it as being "more of an open discussion" where the group works on everyday challenges together, including who loads the paper in the plotter and when to get on the balcony.

"It's not reading the book and learning every little thing about the book, but it's really trying to apply the book," he said. "Because everybody has read the book and knows the book, and they know the key phrases of the book, like getting on the balcony. But what times are we really getting on the balcony? That's what we are talking about."



## Moving Forward

**“Leadership is a journey that has no ending point.”**

**Toni Dezomits**

Assistant Police Chief

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Toward the end of the class, Assistant Finance Director Kim Branch presented a potential project for the group that involved both adaptive challenges and technical problems. The Town was at a “breaking point” when it came to its accounts payable process, resulting in the Town not being able to pay all of its vendors on time.

“The class created a sense of urgency around the [accounts payable] process,” Jones said. “I think that traditionally the Town staff would have kicked it up to the directors, and while they had been notified by staff, it wasn’t changing fast enough.”

Several people in the group, including Jones, began to direct their energy to improving this process, including identifying the adaptive challenges at the heart of the problem. As a result, the adaptive leadership class wrapped up so that those involved could run with it.

“If the goal of the class was to take what you’ve learned and apply it, the AP situation seemed like a great thing to have come out in order to direct our energy and attention to that,” Hutchins said.

The inaugural adaptive leadership class group also continued to meet to share their adaptive challenges within their departments and seek out advice from their new coalition.

“I feel like we as a group are just getting to the good stuff,” Drye said. “I’d love to see us be more action oriented where we continue past the [bill paying issue] and say, ‘Okay. What’s next? Where can we apply

our influence to make other changes,’ because I know there are a ton of other things we could work on.”

But Ault said he was surprised the entire focus shifted to improving the accounts payable process. He said he would have expected the inaugural group to push for another class.

“Either another class spawns up or there’s somebody who goes out of their way who wants to keep doing it. That’s what I would have expected but instead it’s actually channeled into the operational, which kind of tends to be the Cary way,” he said.

A new iteration of the class was planned with a new group of participants for the coming months, taking into account some of the feedback from the inaugural class. The new class would retain the structure of the first but would have a smaller, yet diverse, group, with more networking opportunities.

“I’m hoping the members of the first adaptive leadership class provide a broader perspective of their experiences and how adaptive leadership has shaped their journey here at the Town,” Hutchins said. “It’s also just another connection point between our employees.”

## Resources



**Dan Ault**  
Assistant Town  
Manager



**Kim Branch**  
Assistant Finance  
Director



**Mike Cooper**  
Assistant Fire Chief



**Toni Dezomits**  
Assistant Police  
Chief



**Katie Drye**  
Senior Planner



**Allison Hutchins**  
Organizational  
Development  
Manager



**Alex Jones**  
Water System  
Manager



**Billy Lee**  
Stormwater  
Engineering  
Manager



**Carolyn Roman**  
Public Information  
Supervisor



**Cassie  
Schumacher-  
Georgopoulos**  
Assistant  
Development  
Director



**Brian Stark**  
Inspections  
& Permits  
Operations  
Manager



**Sean Stegall**  
Town Manager



**Laura Turk**  
Assistant Human  
Resources  
Director



**Sammy Wood**  
Transportation &  
Facilities Project  
Manager