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& Associates, LLC

Equipping Leaders. Aligning Resources. Engaging Mission.

How To Lead When You Don't Know Where You're Going

Leading in a Liminal Season

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Leading in a Liminal Season

***Liminality:* A quality of ambiguity and disorientation that occurs in transitory situations and spaces, when a person or group of people is betwixt and between something that has ended, and a new situation not yet begun.**

During liminal seasons, we occupy space on both sides of a boundary or threshold. We have one foot rooted in something that is not yet over, while the other foot is planted in a thing not yet defined, something not yet ready to begin. We function with structures, identities and relationships formed by our old experiences, although we know that those structures and processes will not serve us adequately in our present reality or in the future.

Liminality is more than new people in new roles, or organizations going through transition. Liminality can describe the state of an individual, a place, an organization, or an entire institution evolving. In fact, liminality can describe the disorientation of an entire era or civilization.

Leading in a Liminal Season

“There is a sweet spot between the known and the unknown where originality happens; the key is to be able to linger there without panicking.”-Ed Catmull (Pixar)

Opportunities in a Liminal Season:

- **Communitas:** A state of relationship that occurs in an unstructured community. Hierarchies dissolve. People become equal. The very soul of the community itself emerges. Fellowship, spontaneity and warmth emerge as a new ethos of interrelatedness breaks forth.
- **Innovation:** The organization is more willing to examine, reinvent and take risk as long-established structures and processes unfreeze.
- **Rediscovery of the core:** What matters most to us? Who are we when we are at our best? What will not change about us? What needs to evolve?
- **Cultivating collective wisdom:** How do we know what we know? What do we know and what can we observe beyond our habitual patterns of knowing and doing?

Threats in a Liminal Season:

- **Anxiety rises:** How do we keep anxiety in a productive and useful zone of disequilibrium? What happens if there is too much anxiety?
- **Denial: Powering through** as if nothing has changed. The anxiety moves underground and we revert to status quo behaviors that no longer serve us well.
- **Changing power dynamics.** Leaders who have been at the core often move to the edges and those who have been at the edges move into the center.
- **The emergence of tricksters:** Charismatic figures who look like leaders, but they are incapable of giving and sharing or participating well in a democratic process. Their behaviors are almost always self-serving and they lack deep commitments to the welfare of the organization.
- **Leadership rejection:** When people are anxious they often turn on their leader(s). The leader needs to stay alive to lead another day.

Leading in a Liminal Season

Exploring Three Related Concepts

- **Liminality:** A state of ambiguity and disorientation that occurs in transitory situations and spaces.

- **Leading with Presence:** A fundamental leadership stance grounded in a sense of wonder and open to the leading of the divine.
 - Refuses to acknowledge the false dichotomy that we have created between organizational leadership and spirituality.
 - Seeks to infuse good organizational leadership with a contemplative leadership presence.
 - Assumes that God cares about what we do in institutional settings- beyond simply operating with strong moral character.
 - Trusts that the Holy Spirit will guide our collective actions if we get out of the way.
 - Embraces the soulfulness of the institution.
 - Honors the interaction of the soul of the leader and the soul of the institution.

- **Tending the Soul of the Institution:** A body of leadership work that invites us to access the divine spark within the institutions we lead.
 - Deepening Discernment
 - Shaping Institutional Memory
 - Clarifying Vocation
 - Engaging Emergence

Traditional Leadership Stance

Task	What the leader is expected to do:
Direction	Provide problem definition & solution
Protection	Protect from external threats
Order	
Orientation	Orient people to current roles
Conflict	Restore order
Norms	Maintain norms

Source: Ronald Heifetz, Alexander Grashow, & Marty Linsky, "The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World." 2009. Boston: Harvard Business Press.

Leading with Presence: Three Shifts in Stance

From Knowing		To Unknowing
From Advocating		To Attending
From Striving		To Surrender

- 1. From Knowing to Unknowing:** Traditional practices of leadership invite a leader to apply the best of what they know to an identified problem or challenge.

In “unknowing” we cultivate the capacity for slowing down our thinking, observing our thinking patterns and recognizing our own compulsions, ego-centric concerns, and short term investments. We observe our judgments and the categories of thinking that we have come to rely upon in order to make meaning of our experiences.

- 2. From Advocating to Attending:** Traditional leadership practice expects leaders to advocate for a vision, a position, or an outcome. Leaders are often selected based on their ability to advocate for a constituency, a mission or a status quo.

Attending is a shift in perspective that arises from stillness. Instead of advocating for a particular outcome or constituency, I am fully present to myself, to God, and to the whole of the institution. I can listen from a true center, not from my false ego self.

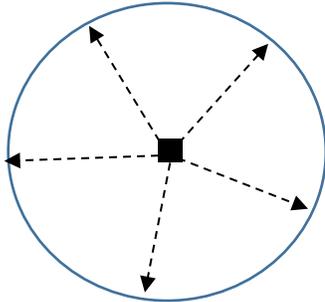
- 3. From Striving to Surrender:** Leadership, particularly in today’s environment, is often an exercise in hard work and striving towards an idealized future. We do our best to push towards excellence, for ourselves and the organizations we lead.

Surrender is a conscious act of acknowledging and welcoming our present reality, for all that it has to teach us and for all of the ways it can mold us. It is not the same thing as giving up.

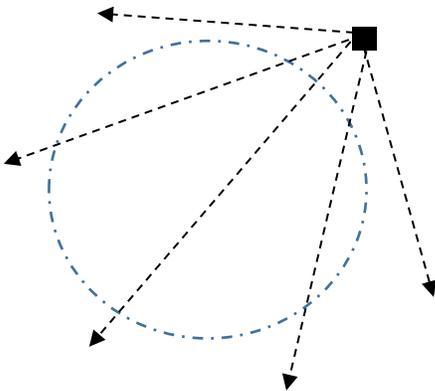
Releasing That Which Binds Us

How can we shift our attention so that we connect to our best future potential, instead of continuing to operate from the blind spots of our past and our ego?

Shifting the Field of Attention/Awareness



Staying in patterns of the past-viewing the world through one's habit of thought (knowing, advocating, striving.)



Attending to the situation from the whole-the boundary between observer and observed collapses, the system begins to see itself in relationship to itself, its environment, and its divine purpose. Boundaries become porous. (unknowing, attending, surrender)

Adapted from: C. Otto Scharmer, "Theory U: Leading From the Future as it Emerges". San Francisco: Berrett-Kohler Publishers. 2009.

Releasing That Which Binds Us (Cont.)

Requires Examining Our Blind Spots

Blind spot = the inner place or source from which we operate.

Our blind spot forms the source and quality of our attention; it is the inner place from where our actions come; the source of our awareness

Leadership Instruments Available to Us	Capacity Required	Barriers to Engaging	Barrier keeps us locked in the state of...
Open Mind	Intelligence Quotient	Voice of Judgment	Knowing
Open Heart	Emotional Intelligence	Voice of Cynicism	Advocating
Open Will	Spiritual Intelligence	Voice of Fear	Striving

Three Internal Voices that Create our Blind Spots:

The **Voice of Judgment** (VoJ) is intellectual. It tries to seal off the mind & protect the status quo. It prevents creativity. It wants to keep us in a knowing stance.

The **Voice of Cynicism** (VoC) is born of mistrust. It tries to seal off the heart from vulnerability. It wants to keep us in an advocating stance.

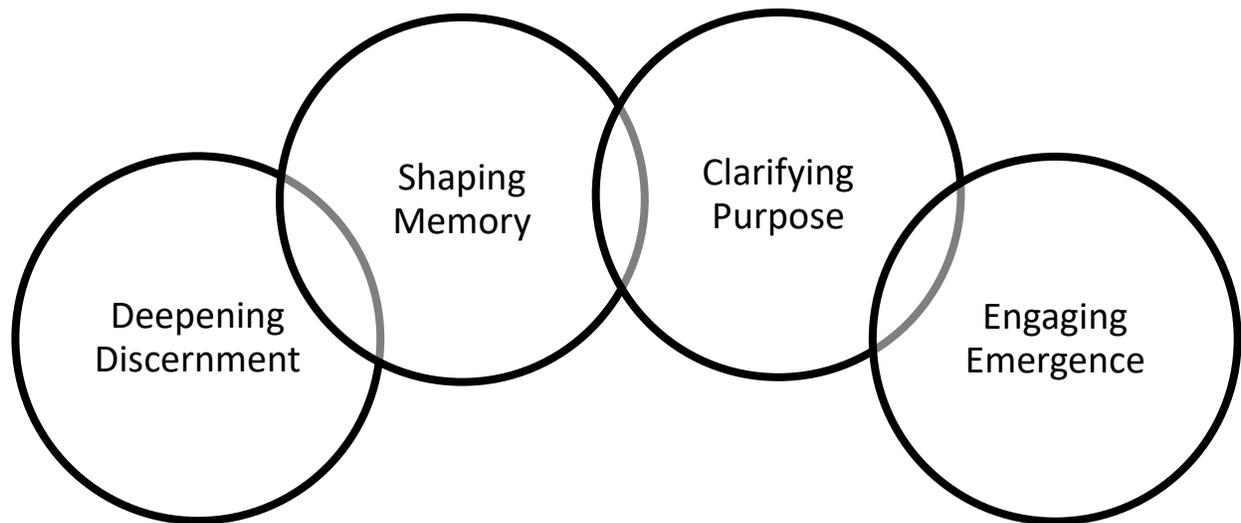
The **Voice of Fear** (VoF) blocks the gate to open will. It seeks to prevent us from letting go of what we have. It wants to keep us in a striving stance.

Source: C. Otto Scharmer, "Theory U: Leading from the Future as it Emerges". San Francisco: Berrett-Kohler, 2009.

Tending the Soul of the Institution

The soul of the institution is the agent of divine spark within. The soul is the authentic and truest self of the institution; the source of its divine calling, and character; the protector of institutional integrity.

Institutional Soul-Tending Involves Four Bodies of Work:



Deepening Discernment: Yearning is the language of the soul. The soul of an organization often expresses itself through the collective yearning of its membership body. Soul tending work requires sharpening group discernment skills, it requires deeper listening as collective yearning finds expression.

Discerning on behalf of the whole and with the soul raises some challenging issues. Who is authorized to speak on behalf of the soul of the institution? How does daily decision making relate to discernment? Where do we locate discernment in the life of the institution? Leaders must respond to these questions as part of authentic soul-tending work.

Institutional Soul-Tending: A Working Definition (cont.)

Shaping Institutional Memory: Poet and theologian John Donohue wrote that “soul is the place where memory resides”. The soul of the institution is stable, but not static. It has been on a journey. That journey includes clarifying moments and wounding moments.

Wounding moments in an organization’s past diminish its future capacity, if left unexplored. Within the soul of the organization lies a capacity for the rediscovery, reframing, and healing of memory. There is generative capacity in the rediscovery of foundational memories that have long been forgotten. Through work with lost or damaged institutional memory, through story an organization can rediscover its purpose, values, and integrity.

Clarifying Purpose: Determining what is ours to do is at the heart of the liminal experience. Amidst disruption and disorientation, the leader must help the organization determine what is worth preserving, what can be released, and what must be adapted. This requires forming a proximate purpose centered around four basic question: Who are we? Who are we here to serve? What do we stand for? What is God calling us to do or become next?

Engaging Emergence: Emergence is a naturally occurring process in which order arises out of chaos. Anytime a group interacts in conditions of upheaval, disturbance or dissonance, a moment arises when disorder gives way to order. Something new emerges, a higher order pattern, a decision, a structure, or a change of direction. Innovation happens naturally in the face of complexity if we allow it.

Emergence follows a predictable pattern in liminal seasons: disturbance, disharmony, innovation, coherence, and adoption. We cannot control or manage emergence, but we can lead people through it with an appropriate soulful stance.