

THE POINT OF CASE-IN-POINT

Six Anchors for Turning Classrooms into Living Leadership Labs

BY JILL HUFNAGEL

It's day four of our Foundations of Leadership course, and as is our practice at the end of class, a participant who has been "sitting on the balcony" (observing the class as a system) has come down front to offer her observations. With nervous laughter, she begins, "Class today? It was a mess."

And to her eyes, I believe that's how it looked. My guess is that many others in the class agreed with her assessment. She got quite a few head nods; some chimed in with laughter. And then, she talked about what she had seen: a pattern of certain students dominating the conversation and interrupting while others patiently awaited their turn. Emotional reactions to the ambiguity and unmet need for order from authority. A tense conversation about an alpha female dynamic present in the room.

For me, her "mess" was a resounding success. Participants experienced trademark challenges of engaging in acts of leadership in every other room they will enter: uncertainty about the rules of engagement, disappointment with authority, thicket issues around gender. In short, they pinpointed the frustrations and identified the capacities they will need to grow if they are going to engage in acts of leadership.

WHAT IS CASE-IN-POINT?



a teaching method that uses a group's own interactions to LEARN CONCEPTS.

WHY DO YOU USE IT?



it makes it possible to more fully experience the challenges of LEADING IN A CLASSROOM.

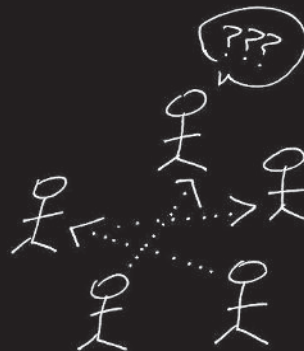
HOW DOES IT WORK?



rather than lecturing, the teacher calls out observations, questions, interpretations and takes provocative actions to help the group UNDERSTAND the LEADERSHIP CONCEPTS being illustrated in the room.



TRADITIONAL
TEACHING METHOD



CASE-IN-POINT
TEACHING METHOD

A CORE QUESTION — **CAN LEADERSHIP BE TAUGHT?** — IS ONE THAT TYPICALLY REMAINS WELL-HIDDEN, BELOW THE SURFACE OF SYLLABI AND EXECUTIVE EDUCATION OFFERINGS.

Leadership is observable. It's in actions we can point to. And leadership engages us beyond the cerebral, in below-the-neck, feel-it-in-the-gut sorts of ways. What happens in leadership classrooms and large-scale leadership development programs varies widely and speaks to the ambiguous nature of the word and the processes by which we might grow leadership capacity on both individual and organizational levels. A core question – can leadership be taught? – is one that typically remains well-hidden, below the surface of syllabi and executive education offerings. Serving as counterpoints to a certain collusion in avoiding that tough question are both a decade-long research project that resulted in Sharon Daloz Parks' 2005 book "Leadership Can Be Taught" and a symposium of the same name hosted by the University of Minnesota. Both posit that leadership can indeed be taught.

While leadership has wormed its way into curricula across the country and around the world, leadership can't claim discipline status, which occurs when there is something of a consensus about what is known and how we should research and teach. At least not yet. Those of us in this loosely-held-together field may share the same landscape, but what's happening in leadership classrooms is so disparate that the gold standard "discipline" remains beyond our reach. We have little to no shared language, and the pendulum swings past the outfield in terms of any concurrent belief in how to grow leadership capacity. We have yet to sort out what is truly essential in a leadership education experience, much less how we might assess participant development. If we aspire to stake out the territory that is leadership, then we have much surveying and debating before us.

As a foothold along the way, the turf I aim to claim is this: the power of Case-in-Point teaching, a methodology pioneered by Ron Heifetz and his Harvard Kennedy School colleagues. Case-in-Point is a framework that connects the dynamics in the moment with key leadership concepts, in effect breathing life into

theory through the unfolding narrative in the room. Positing that the challenges endemic to engaging in acts of leadership mirror those within the learning community, the method seizes the opportunities alive in the classroom to both discern and dissect vital leadership thinking and strategy. Case-in-Point offers participants a thoughtfully crafted inroad into mapping the systemic forces at play in the moment, while simultaneously inviting participants to notice their own default patterns and relationship to authority. No other leadership model is charged with the human element in the ways that Case-in-Point is. Which underscores my belief that if you're not teaching through an experiential framework such as Case-in-Point – at least some of the time – then you're not really teaching leadership. That's because you're not providing a way for participants to learn leadership through their own practice.

While in its 30th year, this innovative methodology is alive in only a scattering of classrooms. (Editor's note: This includes the Kansas Leadership Center, where Case-in-Point is a primary teaching method.) Those using Case-in-Point are experimenting with a vital question: How do we shift our classrooms to become spaces to practice leadership rather than simply study it? If our hope is to prepare people to exercise leadership, then this aim is quite different from the academic learning on the agenda of most courses. The cornerstone of Case-in-Point is a belief that to teach leadership well, those in the teaching role must be actively doing – not simply talking about – the very things they're aiming to teach. What are these doings? Managing self, exploring the relationships to authority playing out around the room, surfacing factions, orchestrating conflict. In short: the complex work at the heart of engaging in leadership outside the classroom.

Rather than continuing to work and live in ecosystems of less – fewer resources build unrest; a desire for less risk squelches innovation; with less time to think,



DISCUSSION GUIDE

After you read the article about the anchors of teaching Case-in-Point, watch this video about why the Kansas Leadership Center uses the method with its participants. <http://vimeo.com/45326837>

What do you think is the most challenging aspect of teaching Case-in-Point from a teacher's perspective? What is the hardest part for participants? If you have experienced it yourself, what was the hardest part for you?

In what ways might teachers and participants use these challenges as productive tools for learning? What do the challenges of teaching Case-in-Point tell us about the challenges of exercising leadership more broadly?

we jump to solve the wrong problems – this is a leadership development model built on more. If, as we hear far and wide, we need more leadership, then we also need to create frameworks that serve that up more: more opportunities to experiment, more relationship-building skills, more moments for honing insight, more diagnosis, more possible responses beyond our current defaults.

At the same time, Case-in-Point also asks more of facilitators: more willingness to think aloud, to change course, to remain open to what is alive in the room not printed on the schedule. Yet with this promising “more” comes another, rather daunting set of “more”: more possibilities of not knowing which direction to head, more chances of appearing incompetent, more moments that feel like failure. In this way, the efficacy of the session is often a direct result of the facilitator’s willingness to model those very dicey leadership capacities many of us avoid at all costs. To create training spaces every bit as alive as the world outside them necessarily involves risk. And tremendous reward.

This approach to leadership development uses the learning space as the ultimate laboratory to observe and unpack the complexities of exercising leadership as they show up in the room, thus the term Case-in-Point. Keeping one eye on the shared work – in this case, learning leadership theory while understanding the classroom system in which we are all embedded – participants are challenged to identify acts of leadership as they occur. Here, an act of leadership is cast as an intervention that advances that shared work: identifying the challenges of engaging in leadership as they show up in the room.

What typically gets in the way of this work? The need to appear competent, and therefore avoid asking questions. The need to be right and in turn avoid experimentation. The need to act quickly and thus skip over diagnosis to engage in hasty action.

These trends are the hallmark of the idea that “if you do what you’ve always done, you’ll get what you’ve always gotten.” Whether teaching leadership or attempting to engage in acts of leadership in service to our deepest challenges and concerns, ambiguity typically holds center stage. It’s when we don’t know how to solve a problem, what to do, where to turn that we need leadership. Here’s a stroke of brilliance, care of Case-in-Point: Make that ambiguity wildly productive. The methodology allows a facilitator to acknowledge and use that inherent messiness to engage participants emotionally while emboldening them in action.

How, then, do we help folks see what it is that they’ve always done and that they continue to do? With lots of mirrors and an overarching maxim: The only person we can’t see fully is ourselves. Scary. To be sure, it’s a high-wire act – one that requires the very capacities that participants are working to grow in themselves: an ability to manage one’s self in the midst of action, a willingness to listen to conflicting opinions, the strength to call out work avoidance in its many nimble, subtle forms (creating a new sub-committee, screen-scrolling, harboring old conflicts).

To do that, facilitators must observe the system as it is revealing itself, generate multiple interpretations of the data in the room, and then craft interventions that help the system both see itself and engage more purposefully. This ability to reflect in the midst of action demands a discipline and clarity that is surely humbling and then some. But with practice and purpose, I’ve found my own trepidation is surmountable.

In attempting to both use and encourage others to use Case-in-Point, I've discovered six anchors that help keep me grounded as I navigate the unsteady-by-design terrain of Case-in-Point teaching.

1

FRUSTRATION AND DISCOMFORT ARE PART OF THE PROCESS.



The deeply countercultural components of Case-in-Point often erupt into frustration with the person at the front of the room. In varying forms, participants will say, “I thought you were going to teach me.” My response is always the same: “I thought I was.” Here’s the twist, though, which must also be voiced: Case-in-Point involves being a learner in ways that we don’t yet know how to be. Ditto for teaching in this way. Just as our students will ask to be taught in the way they already know how to learn, this force will rear its head again and again in the classroom. And it tends to get traction, showing up in other forms.

The song beneath the words tends to be some arrangement of “keep me comfortable” – in work (leadership) that is by its very nature deeply uncomfortable. Because participants’ varying expressions of wanting their own need for comfort to be honored shows up repeatedly, helping them notice this proclivity is incredibly helpful. When we cast the “comfort” net a bit wider, we’re able to counter push-back wrapped in language around “respect” and the noble elevation of one’s own values. Rather than entertaining requests that legislate “respect” (a highly subjective quality, individually scripted and culturally entrenched), I’ve found that encouraging experimentation and generosity of spirit with one another can disrupt this debate. Similarly, participants will demand order – “hand raising, please!” – or equity – “no interrupting” – when they feel frustrated, when facing ambiguity or uncertainty. To cede to comfort rather than to leverage this moment, so that participants learn to be more effective in the face of frustration, is to lose sight of the power of Case-in-Point.

**IF PARTICIPANTS WANT TO GROW THEIR LEADERSHIP EDGE,
THEY WILL HAVE TO GROW THEIR CAPACITY FOR BEING UNCOMFORTABLE.**

2

TO ENGAGE IN MEANINGFUL LEADERSHIP DEVELOPMENT, WE MUST LEARN TO NAVIGATE DISAPPOINTMENT.

In traditional training settings, the front-of-the-room contract with participants is based on having answers, on expert knowledge. The person at the front of the room is there for a reason: typically, to share expertise, wisdom, experience. Participants have a set of expectations based on this same reasoning: that they will learn in familiar ways from the authority figure, that a certain hierarchy will govern the day's interactions, that the front of the room "knows more" than the bulk of those across the room. Case-in-Point both surfaces and subverts these expectations and in so doing generates losses. These losses might be participants themselves who leave the classroom, negative course evaluations, the loss of control on the line when we lean into the moment rather than the PowerPoint. These losses cut across the system, and therefore wrestling with casualties becomes most productive when this wrestling is taken up as the shared work of participants alongside those facilitating within this framework.

My sense is that we always have losses in our classrooms. We simply agree not to surface them. We disappoint our participants in myriad ways: with concepts out of sync with their lived experiences, by boring them with our lectures, by assigning group work. Those losses are tangible if we look for and name them.



EXHIBIT A:
The participant who flips
from his workbook to Facebook.



EXHIBIT B:
The participant who comes to class late.



EXHIBIT C:
The participant who
zones out for half the session.

The list is long, and we're typically complicit in pretending otherwise. To honor these losses is to connect them clearly and compassionately to the purpose of the leadership classroom. For participants to develop the thicker skin necessary to engage in acts of leadership, they will both disappoint and be disappointed by authority. Again. And again. Allowing them to navigate that disappointment in a learning environment means they can become both more skillful in intervening and more resilient in the face of the inevitable disappointments and losses that come with acts of leadership.

3

EXPOSING MISCONCEPTIONS ABOUT AUTHORITY FUELS LEARNING.



When authority fails to behave predictably – by providing protection, order, direction – participants will wonder whether what’s happening in the classroom is contrived, planned or otherwise manufactured. I cast this as a “magical thinking” kind of authority relationship – one on the Wizard of Oz spectrum. Beneath this sentiment is a set of beliefs about authority:

(1)

THAT AUTHORITY IS WORKING THAT HARD.

(2)

THAT AUTHORITY IS SO ALL-KNOWING TO BELIEVE
THAT IN BEING “SET-UP” PARTICIPANTS WILL LEARN.

(3)

THAT AUTHORITY IS BY NATURE A VEHICLE OF MANIPULATION
AND ONE DEMANDING A LEVEL OF SKEPTICISM AT ALL TIMES.

(4)

THAT AUTHORITY KNOWS MORE/BETTER THAN I DO.

As these sentiments are voiced, they present an opportunity to examine the ways in which these mind sets both serve and skewer individuals and systems. Ideally then, in-the-moment examination of these beliefs allows participants to experience their own seeing and to expand their ways of thinking about and in turn interacting with authority.

4

FACILITATORS MUST SEPARATE WHO THEY ARE FROM THE ROLE THEY ARE PLAYING.

Participants will confuse self and role as they experience and make sense of this disorienting approach to facilitation. Participants often expect authority to take care of them, to be likable, to meet their needs. Case-in-Point, however, posits that by catering to those very needs we do little to activate participants attempting to deepen their leadership capacity. Therefore, the facilitator must be adept at serving the system rather than the self – a leap that is both frightening and liberating. The role of the facilitator is not to perpetuate dependence, which feeds our own sense of competence. Rather the role of the facilitator is to serve as an anchor while participants get their bearings, to help them renegotiate their dependence on authority and to seed the belief that, by experimenting in the training arena, participants are growing their own leadership capacity in ways that will serve them outside the room.

Here's how this plays out: Participants will have an emotional reaction to the way in which I'm working at the front of the room. They will confuse my willingness to work my edge in service to systemic learning with who I am outside of this role, my deeper self. Richard Pascale, in his work on the Cambridge Leadership Associates advisory board, put his finger on this piece of the work of Case-in-Point:



“THE SECRET SAUCE HERE IS THE WILLINGNESS TO NOT CARE ABOUT BEING LIKED IN THE MOMENT.”

To connect Pascale's insights to the work of leadership development, it's also about keeping one eye squarely trained on the work in the room: helping participants grow their own leadership capacity. Nothing in that work promises being liked while doing so.

Another potential response to working this edge that I've found helpful: I can divide my self from my role in service to this work not because I don't need to be liked but rather because I'm meeting that need outside of this context in the rest of the relationships in my life. This is also a caveat to practitioners. Unless we're solid outside the room, it's tough to do this work inside the room. In short, one demands the other.

5

CASE-IN-POINT HELPS A GROUP DISCOVER ITS RESILIENCE.

The temptation to privilege group harmony (not interrupting, tolerating unproductive conversation, attempting democracy) over group progress is both strong and seductive. Groups tend to skew toward rules of engagement that are pleasant and polite. Yet this sugar-coating also serves to maintain a surface-level illusion at odds with the work of leadership. By investing in this illusion – work the group is typically already quite adept at – the opportunity to engage in more challenging leadership development work is minimized. Collusion is a galvanizing force in every system – particularly when the collusion serves a “not.” Not behaving differently, not interrogating one’s own assumptions, not rocking the boat. In short, it’s a brilliant, collective engine for work avoidance. Suggesting that the group has some untapped resilience and burgeoning capacity allows members to test their assumptions about rules of engagement, work that results in a riper, more robust space to learn and develop core adaptive leadership skills.



6

GROWING CAPACITY IS THE POINT OF THE METHODOLOGY – AND THE DISEQUILIBRIUM.

When we get lost, connect to purpose. In this case, the purpose is to teach others how to engage in acts of leadership, which means they must first experience the disorientation endemic to the methodology. That participants tend to push back against that disorientation is to be expected. Countering that push-back by reconnecting to purpose is a tool that serves me and the groups I work with well. When I get lost – and I will – this is a place to hold tight. We create these educational environments rife with ambiguity, conflict and disappointment in service to something larger: growing our capacity to navigate those same thickets beyond the walls of the learning space. Again, the language of more, of abundance, of generating possibilities in the room thanks to the Case-in-Point framework can be helpful here.

As I go back to that opening snapshot, I think about the points of adaptive-leadership theory on the slate for the course and how those concepts came to life in the room. The distinction between leadership (an action) and authority (a role based on protection, order, direction); the challenges of working across factions; the need to regulate the temperature in the room, so that the time is productive. All of these concepts on the page played out in the moment. No longer were they theoretical ideas; rather, they became a part of the lived experience in the room. Coupling opportunities to learn from successes and failures with the continued reminder that what happens in this room mirrors what happens outside of it, participants have a place to identify the complexities of leadership and experiment with how best to deploy themselves in service to meeting their most complex leadership challenges.

While I could use more conventional approaches to delivering this material, inherent in those methodologies is a gap between the subject of leadership and the ways in which I might engage in acts of leadership to catalyze learning. That gap is seductive, promising mountains of safety both for participants and for me. However, I've yet to see that we need leadership in safe spaces. What I notice is a deep need for acts of leadership when the climate is unsafe, unsure, shaky. Thus the learning space has to reflect that same uncertainty if we are truly wedded to the work of meaningful leadership development.

Given that premise, using Case-in-Point does not come without losses. I often ask leadership educators and practitioners a core question to surface a tension in the room: "What losses are you willing to bear in service to your own leadership development? And to the leadership development of your participants?" Their responses are typically steeped in fear: fear of losing the client; fear of upsetting participants and plummeting evaluations; fear of losing the little

ground we have in establishing leadership as a legitimate discipline; my shared fear of appearing incompetent, of failure, of being overthrown.

The antidote to this fear is the possibility inherent in Case-in-Point: the possibility of teaching leadership as an act of leadership. When we work from that angle, we gain access to a powerful metanarrative: impacting the trajectory of education. Case-in-Point rejects status quo, front-of-the-room modes of learning, effectively removing the veil that governs our current classroom structures and creating a more dynamic classroom setting. If we are to shape environments ripe for meaningful leadership development, we will have to start by aligning our rules of engagement to meet this deeper purpose. Case-in-Point offers us a map for that realignment, one that hinges on the notion that what is happening in the room is the ultimate fodder for honing our leadership strategy and capacity. The idea that what we learn "in here" – in the leadership classroom – is somehow distinct from the "real world" – out there – suggests that all of us are trapped in the very systems we will have to dismantle and reimagine if we are to survive and thrive. Case-in-Point asks that all of us let go of what is comfortable, known, familiar in service to a larger aim: igniting and sustaining powerful leadership development in our students, our clients, ourselves, and in the world we all share.

Jill Hufnagel's interest in the work of the Kansas Leadership Center began after working alongside KLC President and CEO Ed O'Malley as visiting faculty on the Harvard Kennedy School's Art & Practice of Leadership Development program in 2012. Since then, she has made three trips to Wichita, each time more deeply moved by the powerful leadership development work catalyzing at KLC. She is the associate director of the Batten Leadership Institute at Hollins University in Roanoke, Virginia. She loves hiking trails with her two dogs and cooking for her family of adventurous eaters.

ADDITIONAL CASE-IN-POINT RESOURCES:

"Case-in-Point: A Taxing and Transforming Leadership Education Art Form" by Chris Green. Published by the Kansas Leadership Center. klcj.rn/cipgdbk

"Case-in-Point: An Experiential Methodology for Leadership Education and Practice" by Michael Johnstone and Maxime Fern in the Fall 2010 Kansas Leadership Center Journal. klcj.rn/cipexpm

"The Harvard Experiment: Living 'The Art and Practice of Leadership Development'" by Patty Orecchio, Barbara McMorrow, and Marg Connor in the Summer 2008 issue of Principal Connections. klcj.rn/hrvdexp

"The Class of the Forging Paths': Leadership and 'Case-in-Point'" by Adriano Pianesi in *The Systems Thinker*, Vol. 24, No. 1. klcj.rn/frkpthscip

"Leadership Can Be Taught" by Sharon Daloz Parks, published in 2005 by Harvard Business School Press. klcj.rn/lcbtbook